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Doctorate in Professional Studies

What is the effect of long-term coaching engagements on the business coach's process and approach?

A project submitted to Middlesex University in partial fulfillment of the requirements for the degree of Doctor of Professional Studies

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Abstract

What is the effect of long-term coaching engagements
on the business coach's process and approach?
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The aim of this project was to examine whether changes occur to the process and approach of business coaches' practices during long-term business coaching engagements. This was accomplished by reviewing literature, then gathering new data to provide a richer, deeper understanding of business coaches' experiences and analyzing their reflections regarding their long-term business coaching activities. Within the coaching industry, techniques, competencies, values and ethics are routinely addressed in coach training programs, however, the occurrence and dynamics of long-term engagements has been mostly overlooked by the coaching community, as evidenced by the scarcity of literature and research on this topic to date.

A mixed-method approach was used for data collection, which included a survey and semi-structured interviews. Thematic analysis revealed evidence that the coach's initial process or model often changes when working with a 'longevity client,' though the foundational premise of being fully present and asking targeted questions does not. The evolving and deepening relationship between coach and client was identified as a key component driving changes to the coach's work. The data revealed that often the business coach's role expands beyond the traditional definition of coaching to include more input and direction.

A confirmed finding from this research is that long-term business coaching engagements are an embedded component of the coaching spectrum. As such, this research provides the basis for further exploration regarding the benefits, expectations, and outcomes of long-term coaching. This project surfaced issues that are ripe of further research, both for long-term engagements and for coaching at large; knowing when and how to terminate client engagements, client friendships, dependency within the dyad, the evolution and breadth of coaching services and financial considerations within the coaching agreement. This research lays an expanded and documented foundation for the coaching industry to more fully explore the interactive dynamics of long-term business coaching engagements and their impact on both the coach and client.

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Deep and heartfelt gratitude from this researcher to each coach who generously contributed to this project. It may take a village to raise up a child, however I have learned that it takes a whole global community to raise up a doctoral candidate. I was blessed to have the support of such a community to escort, encourage and assist me through this doctoral journey:

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Disclaimer: The views (separate from quotes and facts) expressed in this document are strictly my own and not necessarily the views of my supervisory team, examiners, or Middlesex University.

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Glossary

COMENSA

Coaches and Mentors of South Africa

An association serving the coaching and mentoring industries in South Africa and other countries.

EMCC

European Mentoring and Coaching Council

An association serving the coaching and mentoring industries throughout Europe.

External Coach: A coach who is hired and brought in to coach an individual or team within an organization that the coach is not employed by.

ICF

International Coach Federation

A USA based association serving the coaching industry worldwide.

Internal Coach: An individual who is an employee of an organization where some or all of their duties include coaching individuals or teams within that same organization.

International Association of Coaching

A coaching association serving the coaching industry worldwide.

IOC

Institute of Coaching

A USA based association serving the coaching industry.

Long-term (LT) business coaching engagement (for this project specifically):

Two or more total years of providing business coaching services to the same individual or team. The total time accrued may be continuous, or there may be breaks in the coaching cycle.

Longevity Client

A client that a business coach has worked with for two or more years. The definition of this term applies specifically to the parameters of this project.

Manager-as-Coach

An individual manager working within an organization who consciously uses coaching skills to work with others within the organization.

Process and Approach

Process: the model, system, or method used by the business coach as a framework to coach within when working with a client.

Approach: How the business coach works with a client; the emotional, rational, and political perspectives and paradigms s/he brings to the engagement (Sheth & Sobel, 2000). This consideration is separate and distinct from the coach's theoretical approach which could be evidence-based, ontological, behavioral, or solution focused.

Returners

Coaching clients who reconnect with the same business coach again after a hiatus from working together.

ROE

Return on expectations. (Anon., 2009)

ROI

Return on investment. A common business term used to determine what an organization gains from a particular activity or investment of time and funds.

Sherpa Coaching

A coach training and research institution that has conducted annual surveys related to the coaching industry since 2005.

WABC

Worldwide Association of Business Coaches

A Canadian based association serving the business coaching industry worldwide.

Chapter 1 – Formation of the Research Question

1.1 Introduction

The purpose of research is to learn something new or gather evidence for something.

(Passmore & Fillery-Travis, 2011)

The above quotation certainly holds true for this research project in which I have gathered information to obtain a richer, deeper understanding about the impact of long-term coaching on the processes and approaches used by business coaches.

This chapter will outline both the scope and rationale for this investigation and will introduce my position within the project as both a professional coach and also as the researcher carrying out this inquiry. I will chart the origin of the question engaged with in this dissertation, showing my professional interest and motivation. Furthermore, I will describe my background which informs the personal perspectives I brought to this project.

I provide a brief commentary in this chapter on the formation and current standing of the coaching industry in order to provide context for the research question. So that this introduction fully depicts the setting within which the research is situated, I also provide background information to demonstrate the significance of the research question for the global coaching community. An explanation of relevant terminology (separate from the glossary provided preceding this introduction), and the organization of the remainder of this dissertation will be presented at the end of this chapter.

1.2 Origin of the research question and purpose of this investigation

Throughout most of my career as a business coach, my practice has steadily comprised a roster of about sixty percent longevity clients, or in other words, clients that I work with over a long period of time (as outlined in the glossary). Presently this percentage is even higher as I am working with sixteen clients, eleven of whom have been clients for a minimum of four years and within that group, three who are 'returners' – that is, they came back to be coached again after a gap in continuous coaching (in one case, a gap of seven years).

Being well aware of the longevity status of much of my client roster, I have sometimes pondered whether there is a coaching technique or an in-depth study of appropriate methods to be used when working with these clients of which I was unaware. During the development stage of this project I discovered that information and training in coaching skills, listening competencies, ethics, and personal development is readily available for both aspiring and seasoned coaches. However, information was not readily available on the practice or training of coaches working with clients long-term. There is a deficit of discussion on this topic, both within continuing education circles and in the professional and academic literature. This is a paucity of discussion on long-term coaching engagements and their place and impact within the field in related literature and almost none in research. This lack of exploration into a coaching practice that has been acknowledged as occurring within the industry (see chapter 2) rendered it an appropriate topic for research.

Given this absence of research it is clearly appropriate to ask whether the various coaching practices today do (or should) evolve or expand into something different when a coach and client remain professionally engaged over an extended period of time (Wasylyshyn, 2014). If the process or approach does change or perhaps evolve, what is it that differs over time and what does this mean for the business coach and their practice? The inquiry fueling the research question became; are there 'next practices' (new developments) beyond 'best practices' (Ibarra, 2013) that should be acknowledged and taught or offered to coaches who are engaged in long-term coaching relationships?

It is reasonable for the reader to ask why it is pertinent to carry out this inquiry and how the business community might collectively benefit from the resulting answers. I submit that there are at least three important reasons for my research question.

First, as Booth et al. have observed "in all research communities, some questions are 'in the air.'" (2016, p. 33). One such query floating around in the coaching community is whether working with a client 'long-term' (defined as two or more years) is *really* coaching, and whether it is ethical to coach someone for an extended period of time (Scoular, 2018). Issues of dependency have been raised due to concerns that the coach may encourage the client to become too reliant (Stout-Rostron, 2014). Alluding to long-term coaching engagements, executive coach and psychologist Berglas (2002) commented on this concern asserting that, ‘many coaches gain a Svengali-like hold over both the executives they train and the CEOs they report to’ (p. 6).

Because the coaching industry does not yet have a universally codified set of standards, one can reason that opinions about coaching typologies are as individual as the coaches themselves. Given that this field of practice is still developing and is in the process of defining itself and its place in the professional world, it may be that it has been and continues to be evolving through these iterations of definition (see section 2.3). For example, some practitioners and coaching schools teach the idea that there is a traditional stance on the meaning of coaching (Blakey & Day, 2012) Some scholars have attributed this stance to a desire to be overtly distinct not only from one another as coach training facilities, but also from other humanistic practices such as therapy, social work, mentoring and consulting, all of which often engender long-term client engagements (de Haan, 2008a; Stout-Rostron, 2014). Perhaps in aiming to define and codify the industry, this purist stance is ‘a reactive tendency to swing in the opposite direction to an unreasonable degree’ (Bachkirova & Borrington, 2018, p. 10-11). Some coaching academics, for example Dingman (2004) view executive coaching as being issue specific and a short-term form of intervention.

Regardless of the genesis of what might be characterized as unsubstantiated folk wisdom, I have personally experienced an atmosphere of vague and occasionally overt, disapproval for lengthy coaching engagements among some of my fellow coaching colleagues. Being aware and frankly uncomfortable with this attitude, I confess to sometimes choosing not to talk about my continuing professional relationship with long-time clients when this topic has arisen in collegial conversation. Whilst I have felt confident in my coaching skills and decisions, I have entertained niggling concerns as to whether I have been erring in my service to my clients as a business coach. These concerns and the desire to answer them one way or another, are a driving force in my choice of topic for this research project.

Interestingly, there is scant documented research to back up this disapproval. I have collaborated both formally and informally with dozens of seasoned coaches including founders and facilitators of coach training organizations in the U.S., UK, and Canada while conducting this study. Unanimously, these colleagues have acknowledged that this attitude is 'in the air,' but none could offer direction on its genesis other than a recurring guess that it might have something to do with the field of psychotherapy where long-term engagements are common (Engel, 2008; Rogers, 2018; Scoular, 2018). Anecdotally, most of them, like me, have had long-term coaching clients and say that they both enjoy the experience and believe that these sessions are appropriate and in the service of their client. My curiosity and concerns stem in part from my awareness of the circulating negative opinion of a long-term coaching approach and its contrast to my own real-life experience. As a responsible professional striving to be effective and ethical, I want to know and not guess whether I would serve my clients more effectively by more consciously honing how I interface with my clients as time elapses.

A second important reason for conducting this research is that the field of business coaching is a young and emerging industry, not yet a profession (Athanasopoulou & Dopson, 2018; Fillery-Travis & Collins, 2017; Gray, 2006). Therefore, its structure and future status is still being formed and research is a way of creating and refining industry thinking and methodology. Professionalization in developing fields occurs as specific topics are formally identified and addressed that emerge through practice, actual experience, and over time (Fillery-Travis & Collins, 2017). The long-term coaching engagement is now emerging as a topic of significance in the coaching community. Discussion is beginning to take place in academic literature; the topic is being raised among a growing number of coaches, and this research project is an example itself of this burgeoning area. The data collected and presented in this paper has already made an industry impact by providing an exchange of information, debate, and reflection among many business coaches globally, thus adding to the way in which the industry is developing (more on this impact in chapter 7).

The early stages of discussion on this research topic point to the third reason for conducting this study as a benefit to the coaching community: it has been demonstrated that research helps practitioners make better decisions about their own practice. Research informs new experiences, and provides a benchmark for coaches (like me) to answer the question of how other practitioners in the field have adapted, expanded, or evolved their processes and approaches (Campone, 2011). An understanding of how the work of the coach may shift during long-term engagements would allow for improved coaching support and more complete or perhaps different continuing education options.

1.3 Statement of the research question

<u>What is the effect of long-term engagements on the business coach's process and approach?</u>

I explore this question with a mixed methods approach utilizing forms of multiple methods of data collection and by examining emerging themes.

1.4 Scope and focus of the research

This project has been designed explicitly and only to research and explore the process and approach of business coaches when working with a client long-term. As will be discussed in chapter 6, the breadth of the samples, particularly the survey, was wide and thus the results may not lend themselves to being generalized across various coaching contexts. As example data collected may not be representative of the long-term coaching methods of practitioners from varying areas of the world and may not apply to coaches who do not work within long-term engagements.

It is important to emphasize to the reader the boundaries of the focus and scope for this project. The reason that clarification is, as will be shown, a wide range of subjects emerged from the collected data which may be worthy and wanting of further exploration unrelated to this specific study. These topics which have been collected but not analyzed include:

- Possible cultural differences related to long-term coaching praxes.
- How the client experiences long-term coaching.
- Identifying the characteristics of the type of person who may be more likely to become a long-term client.
- The role of ethics in long-term coaching.
- Issues of dependency.
- Friendships formed between coach and client.
- The impact of coaching supervision.
- Contracting specifications, particularly related to long-term engagements.
- Open-ended assignments.
- The definition of what coaching is and what it comprises.

Within this project these topics will only be considered in relation to the focus of the research exploring the effects that long-term coaching engagements may have on the methods employed by the coach.

In their review of executive coaching outcomes Athanasopoulou and Dopson (2018) state that most coaching research to date has been related to the client and not to the coach. They believe that this lack of exploration of processual elements of the coaching journey is a gap in the research landscape in this field. Their observation parallels the results of my own academic literature review when preparing the proposal for this project, particularly when related to processual elements within long-term coaching engagements. I believe that Athanasopoulou and Dopson's conclusions further validates the focus of this project.

1.5 Introducing myself and my epistemology

Each of us is the culmination of our cultural and personal experiences which form our perspectives and shape the approaches that we apply to our personal and professional lives (Costley & Armsby, 2010; Liljenstrand & Nebeker, 2008). In my case, I bring with me to this research a background of being the oldest of five children who came of age in the turbulent and stimulating 1960's. The explorer in me wanted to know why our world was the way it was and how I could make it better. At the same time, my attitudes, beliefs, and actions reflected my generation as well as my geography as a blue-collar baby-boomer from the Midwest of the United States. Situated within these cultural underpinnings, I was born as an inquisitive, knowledge-seeking child who had a longing to explore the world. However, true to my socio-economic standing I held a belief that such exploration was out of reach given my 'station' in life - until I reached the ripe age of nine.

A pivotal experience occurred in my life at age nine; I read the biography of aviator Amelia Earhart. She was born into and grew up in a disadvantaged family receiving little familial encouragement. Yet she was determined to see and do everything that interested her (which was a lot) … so, she did! I was captivated by her fearless determination and somehow, even though only a young child, made the leap of connection that if she *could*, I *could* too. Suddenly I had permission through a successful example to expand my horizons. From the time of this momentous epiphany on, I resolved to discover all the possibilities for who I could and wanted to be, then to *be* that person. Others' goals (or lack of goals) for me all fell away, along with previous self-imposed limitations. I decided that I would simply create my own reality. My sureness, the very center of my being, surged with one conviction – I could craft the reality I wanted to live within and forge ahead in that world. That conviction led me to explore sometimes unorthodox activities: conducting research on Earhart at ages nine and ten, pursuing aeronautics in high school, auditioning for a television show, becoming a licensed disc jockey, performing in plays and traveling for a year while living in a van. These pursuits were precursors to my choice to become a coach which was both unorthodox and a little-known business practice at that time.

Hence, from a young age I have *known* that my life journey has been in my control and that my experiences would be the ones I intended and created. Accordingly, my intellectual habit, my very being is grounded in the belief that I can and do craft my reality. As such I resonate with a constructivist epistemology, the idea of creating meaning through my interpretations of my interactions with the world, of continually interpreting what is true and not true for myself (Gray 2009, 2014; Schwandt, 2015).

In sharp contrast and reflecting a nearly opposite paradigm, I find *comfort* in navigating my environment by being factual, analytical, mathematical, and specific. For example, when indulging in my hobby of genealogical research I am adamant that the facts must be verifiable across various lines of inquiry, open to examination and replication. In this and other circumstances I believe that there is an *answer out there* and that *reality* is discoverable. This approach to life would appear to place my epistemology in the objectivist (positivist) realm (Gray 2009).

Reflecting deeply on this dichotomy of epistemologies and how both convictions are embedded in my personal paradigm, I came to recognize that I have never quite been comfortable with the objectivist (positivist) view that 'the rational is valued over other ways of knowing, such as intuition' (Ryan, 2006, p. 14). Yet conversely, I am also aware that 'absolutes' bring me a form of comfort.

Indeed, I am aware that a part of my success as a business coach is grounded in knowing and understanding the facts of both the fundamentals and subtleties of business. Yet, I rely on my intuition to guide the questions I ask and the observations I make. This is not trifling, and it is even logical in terms of Ryan's definition of 'intuition – broadly defined as extra-rational ways of knowing, honed from experience' (2006. p. 26). The journey I have taken in conducting this research project has necessitated that I examine and understand my attraction to both epistemologies (objectivism and constructivism) and make sense of (construct) this dual approach to the world. Simply, I personally believe that as humans we create our realities and I also believe that we then construct the rules needed to govern those realities. Once I have identified and understood these rules, I find a comforting satisfaction in adhering to them.

To illustrate, I will refer to the earlier example of genealogical exploration. The study of family lineage and the guidelines for proving one's ancestral heritage are all comprised of practices and rules created by different individuals and there are differing rubrics to choose from. The genealogical classifications I choose to follow involve measuring and reporting an individual's life span utilizing the Gregorian calendar. Other genealogists may measure the span of a person's time on earth by different standards such as the Chinese calendar or the Mayan calendar. In this example, it is a fact that an event (birth or death) occurred, however it is the social construction of an individual's beliefs founded by their culture and mores that determines their description and placement of that event (Harsch-Porter, 2011). I accept all as being valid within the reality each has agreed to even if the agreement is subconscious. Prasad (2005) describes this human capacity for social construction as being 'subjective' since it contrasts a fixed external reality (p. 14).

Identifying, understanding and articulating my own worldview has been helpfully instructive because as the researcher, it has been incumbent on me to recognize the cultural backdrop which informs my epistemology and with it the bias I inevitably bring forth from my background into my research (Costley & Armsby, 2010). It has been both imperative and educational for me to acknowledge and understand my own values, beliefs and mores as a way of mitigating personal bias in the findings of this project (Bentz & Shapiro 1998).

1.6 Career background and coaching qualifications

I bring thirty years of active business coaching experience to this research, placing me as a pioneer within the coaching industry. I am a solo-preneur (a professional who works alone in their own company) and I perform my coaching duties through my company, Excelsis Performance Strategies. My occupation as a coach is preceded by twenty years of business background including owning three businesses, selling one business, and holding various executive positions.

Specifically, prior to becoming a business coach I have held the following job titles: comptroller, executive office manager, executive vice president of administration, president (of a boutique securities firm, certified by the U.S. Financial Industry Regulatory Authority and operating under my securities license), and owner. My coaching firm has been active for thirty years and I have co-owned a bilingual (English/Spanish) newspaper, Reflejos, with my husband which we grew into the largest weekly suburban newspaper in the United States. Currently we co-own PJ Synergy, a firm that organizes speaking engagements and the sales of a book my husband and I co-wrote.

I began coaching business owners and executives in 1989, long before the descriptor *business coach* was widely recognized. My practice was both formed and refined in the early years based on my assessment of my clients' needs. I did not have industry guideposts at that time other than my own innate ethics and business standards. Today, I am well vetted in the coaching industry as a professional and am also industry certified having earned the credentials of Certified Business Coach (CBC) and Certified Executive Coach (CEC) in 2002 through the coaching organization The National Association of Business Coaches. In 2008, I also earned the credential of Chartered Business Coach (ChBC™) through a certification program administered via the partnership of Middlesex University and the Worldwide Association of Business Coaches (WABC). I both enjoy and am committed to growing personally and professionally as a means of satisfying my insatiable curiosity and penchant for life-long learning. My self-constructed background has served me well - in addition to providing personal fulfillment and growth, these wide-ranging experiences have expanded my worldview, allowing me to both serve and relate to my coaching clientele as a deep generalist with informed empathy and functional expertise (Sheth & Sobel, 2000).

1.7 My coaching practice and professional relationship to this research

I have held similar (mistaken) ideas as some of my colleagues who were also early adopters of the business coaching sector. At the beginning of my coaching career I naively believed that I had crafted a unique branch of client advisory services that differed from traditional business consulting and that, in effect, I had created a new offering that I called business coaching. In truth I was attempting to meet the needs of my new clients and had stumbled upon services that differed from both consulting and counseling. During my first nine years of coaching, I did not even meet another coach nor was I aware of any coaching associations or schools that I could have benefited from. I felt like I was in uncharted waters, navigating my way based on instinct and with a ferocious appetite to read as many personal and business development books as I could find in a quest to better serve my clients. Later in my career I realized that I was not alone in my self-prescribed vocation and that other practitioners were at work like scattered mushrooms that were popping up in different parts of the forest. Others like myself were beginning to display their business coaching offerings for public notice, offering similar services that were beginning to be codified and taught in coaching schools and shared at newly minted conferences. Looking back, the industry seemed to be experiencing a hundredth monkey effect - individuals unknown to one another who begin doing the same thing at the same time (Keyes Jr., 1982).

I bring expert understanding of the intricacies of business coaching to this project, having coached hundreds of clients in dozens of industries over the past three decades. One external validation of that expertise is that I have earned the designation of Chartered Business Coach™ (ChBC™). This evidence-based certification requires rigorous proof of proficiency and I am proud to say that I am the first coach from the United States to have earned it. Indirect evidence of my accomplishments as a business coach is that my marketing model is designed as referral-only. I do not market or advertise (with the occasional exception of purchasing supportive or charitable ads). My solo-preneur business portfolio is consistent demonstrated by the fact that I have served twenty to twenty-five individual clients at a time for over the past twenty-five years (choosing to cap out at twenty-five clients, I have maintained a waiting list on-and-off over the years).

The client roster within my coaching practice has consistently averaged approximately seventy-five percent small business, fifteen percent executives in mid-size organizations and ten percent executives in large organizations. Breaking it down further, about sixty percent of my client base consists of longevity clients, all of whom I have worked with for many years. At the time of this writing, my longest running coach-client relationship is twenty-two years and we are still active. This professional relationship is unique in that the client has had multiple life and career transitions, so the goals have been refreshed often, though we meet less regularly than other clients, often only quarterly.

The organic make-up of my client base falls primarily in two categories: clients that I work with for less than two years and clients that I work with for six-plus years. The frequency of meetings varies for each client based on mutual schedules, however the continuous, unbroken agreement to coaching remains a constant in our relationship. Furthermore, many clients have ‘returned’ to renew our coaching relationship, sometimes years later when a new goal or issue has arisen for them. Coaching engagements in my practice tend to follow a progression from specific and semi-structured (in-take, agreements, goals, check on progress) to flowing and expanding (the client declares ‘here is what I want to talk about today’). Nearly always a comfortable rhythm develops that is highly productive though distinctly different from the conversations held during our initial sessions.

I have, of course, been acutely aware of the evolution of these relationships and as discussed earlier, I have found myself wondering (and sometimes worrying) about my effectiveness and the explicit impact I have with clients that I work with well beyond the length of time that some consider the average period of engagement (see section 2.6 for a discussion on the typical duration of coaching alliances). Knowing that there has always been a shift in the relationship between my longevity clients and myself over time, I have questioned if my coaching foundation and approach should remain constant or if it is natural and appropriate for my process to adapt into some other distinct form. Equally important to question as part of this research is whether my coaching method and approach is as effective with long time clients as with ‘newbies,’ continuing to stimulate their growth and achievement of goals and milestones.

Expanding out to the coaching community at large, there are certain questions that I want this research to address. As I have previously mentioned, I wonder if there is a certain progression and depth of technique to be adhered to that this investigation could point me toward. Or, is it the case that the base skills of coaching such as (being truly present, intently listening, asking salient, straightforward questions and being non-judgmental (Blakey & Day, 2012) remains basically the same regardless of how many years a coach has spent with the same client? Do other business coaches work for long periods with some of their clients? If they do, are my colleagues experiencing these same internal questions and concerns and if so, what answers have they found?

Thus, the research question has been prompted or more accurately, impelled, by my own experiences in my professional practice. This research project has been an exciting opportunity to explore a phenomenon related to my business and to add meaningful data to the growing foundation of research on the topic of business coaching. An objective is that it will also serve as a catalyst to influence changes and upgrades in coach training, leading to a new and fuller understanding of the interaction that takes place during coaching.

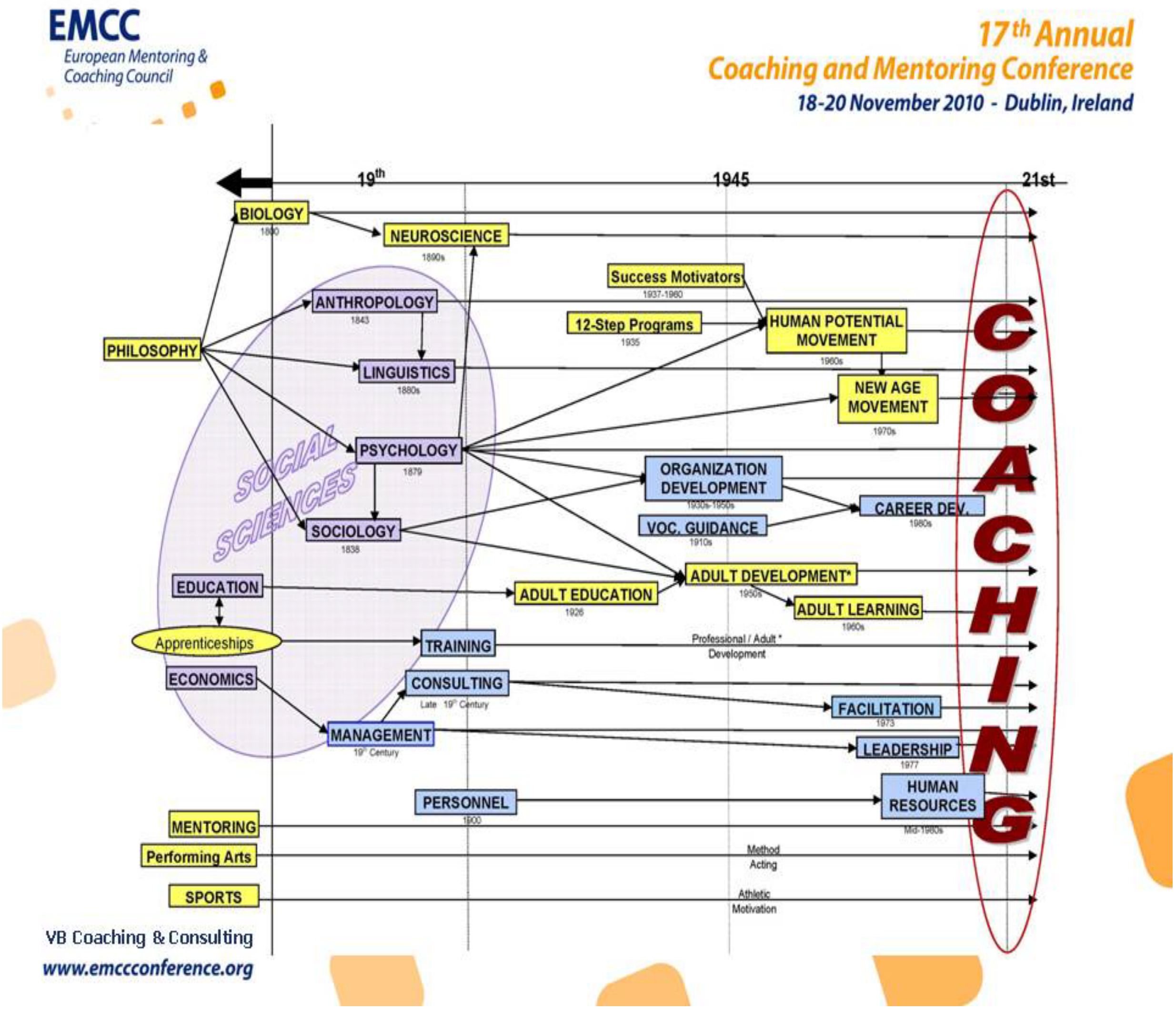
1.8 The coaching industry from which this question emerged

The activity known as modern-day business coaching has both borrowed and evolved from the foundations of a number of disciplines and movements including philosophy, psychology, sports training, business development, management practices, science, the human potential movement, and pedagogical practices in adult education (Brock, 2012; de Haan & Burger, 2014). Figure 1.1 provides a visual representation of the multiplicity of specialties and backgrounds which formed at the intersection of people, disciplines and socioeconomic factors, thus influencing and shaping the coaching industry (Brock, 2010).

Segments from these many disciplines and areas of expertise have been part of the evolution of the professional helping services that have led to the current day version of coaching. This evolution developed in response to changing societal realities. Coaching appears to fill a need, at least in part which was once supplied by an individual's familial, social, and professional networks and perhaps especially by their elders. As societies and economies progressed from the agrarian age to the industrial and then on to the information ages, shifting career opportunities and increased transportation options caused people to become increasingly mobile geographically. As this mobility increased, individuals were often forced to leave their support systems behind (Brock, 2012).

These changes in social fluidity and increasing economic complexity have sometimes led to social isolation, thus creating a human need which has been answered in part by specialists such as coaches (Bachkirova et al., 2017; Brock, 2012). Coaching began to emerge as a helping intervention in the late twentieth century. Considered to be a consultative business service, and having no restrictions on how it was practiced, coaching did not need to adhere to the constraints of traditional therapeutic clinical practices, nor did it carry the stigma of being presented as part of a model addressing illness which has often been associated with traditional therapeutic practices (Engel, 2008). Coaching is more interactive and less structured then some other helping interventions such as psychiatry, therapy, and social work. It is a cross-disciplinary activity encompassing tools and methodology from a variety of disciplines (Brock, 2010; Fillery-Travis & Cox, 2014).

Figure 1.1-1 Foundations of Coaching



Today, though the nascent coaching industry is still being shaped and may or may not eventually achieve status as a profession (Fillery-Travis & Collins, 2017; Grant & Cavanagh, 2004; Lowman, 2013), coaching as a methodology for creating purposeful positive change, that is, as a helping-by-talking intervention is now widely accepted and a firmly embedded component of the global business landscape (Bachkirova & Borrington, 2018; Bachkirova & Cox, 2005; Brock, 2012; Gray, 2006; Stout-Rostron, 2014). Coaching is both collaborative and supportive as a human change methodology, and the processes and approaches utilized by coaching practitioners are as diverse as the coaches themselves (Grant, 2013).

The various cross-pollination processes and practices from various fields that feed into the coaching presents both challenges and opportunities. The challenges include creating and structuring a comprehensive industry from this broad range of influences. The opportunities include discovering and documenting new and/or existing trends in the field of coaching. Conducting and presenting this piece of research related to the coach's process and approach in long-term coaching engagements has been a labor of love because it is about an industry that provides services which I believe in and am proud to be a part of. My intention is that this work will contribute to the professionalism of my craft and the coaching industry at large, regardless of its future status as a profession.

1.9 Related questions to the research

To fully answer the question 'what is the effect of long-term engagements on the business coach's process and approach?,' the following factors have to be explored and satisfied before and during the research:

- Is there a research sample available to be able to explore the question? That is, are there other business coaches who are carrying out long-term coaching engagements as delineated in this research? (chapters 4 and 5)
- If such a sample exists, how can I garner feedback regarding other coaches' experiences to meaningfully explore the question? (chapter 3)
- What are the best practices for were long-term coaching engagements? (chapter 2)

1.10 Key terminology

<u>Bracketing</u>
Within qualitative research, this process requires the researcher to set aside what they think they know or understand to be a fact – to approach the research without bias as much as possible.

Business Coach:

Coaches working in the realm of commerce and enterprise (for-profit, non-profit, academia, and government) use a wide array of titles to designate their role. There is not clear agreement within the coaching industry as to the specific definition of such titles. What is clear is that many practitioners who coach in organizations do not call themselves *business coaches*, instead identifying themselves in several ways, dependent on their training and orientation. A non-exhaustive list includes: corporate coach, professional coach, business coach, performance coach, sales coach, leadership coach, executive coach, team-building coach, developmental coach, and even consultant (Liljenstrand & Nebeker, 2008).

Given this state of titular confusion within the industry, potential participants in this research needed a clear definition of the term *business* coach to guide them to accurately self-select their appropriateness for involvement in this project. The next definition was therefore provided to give clarity to project participants and now to you as the reader. It is utilized throughout the project and has been chosen because it addresses the activity being conducted by the coach rather than their choice of title:

> *The process of engaging in regular, structured conversation with a client, with the goal of enhancing the client's awareness and behavior so as to achieve business objectives for both the client and their organization* (WABC, 2011).

Business Coaching:

What exactly is business coaching, separate and distinct from other forms of coaching? The Worldwide Association of Business Coaches provides a rich and articulate description of the activity as follows:

> *Business coaching is the process of engaging in regular, structured conversation with a "client": an individual or team who is within a business, profit or nonprofit organization, institution or government and who is the recipient of business coaching. The goal is to enhance the client's awareness and behavior so as to achieve business objectives for both the client and their organization.* (WABC, 2007)

One of the common monikers used by practitioners in lieu of 'business coach is 'executive coach.' Describing executive coaching (EC) versus other types of coaching such as wellness, sports, or life coaching, Stern offers this definition:

What differentiates EC most from these other forms of coaching is its dual focus on working one-on-one to develop the executive as a leader while also helping that leader to achieve business results (2004, p. 157).

Client/Coachee:

Whilst the terms 'client' and 'coachee' are often used interchangeably in the coaching industry, the word 'client' is preferred by many coaches to indicate the egalitarian relationship between the coach and the person hiring them. This stance may be, in part, an outgrowth of the movement in psychology in the 1960's to replace the word 'patient' with the word 'client' as a way of minimizing what was perceived as a power differential in therapy (Weiss, 2002). This choice of wording may have an earlier genesis in the social improvement movement led by psychiatric social workers who referred to those they served as 'clients' rather than 'patients' as early as 1907 (Engel, 2008).

The examples offered here refer to one-on-one interventions for the most part (whether that means one coach to one individual, or, to one team). Within the realm of coaching in the business world, a third party is often involved in the form of the sponsoring organization. When this is the case, the organization paying for the coaching is the client whilst the individual who is receiving the coaching is most often referred to as the coachee. Personally, as an outgrowth of reviewing the literature and through discussions with colleagues, I discovered that I also have a preference for the term 'client,' and it is now my chosen descriptor within my coaching practice. Specifically, the concept of reinforcing an egalitarian relationship appeals to me. However, my awareness for this preference surfaced after completing and submitting the proposal to Middlesex University to conduct this research. As a result of my predilection and as acknowledgement of the interchangeability of the terms, both descriptors are used throughout this document, though the term 'coachee' will be used when referencing back to the survey, interviews, and the original proposal to maintain consistent accuracy of reference.

Two definitions of the terms *client* and *coachee* authored by professional coaching organizations are as follows:

An individual or team who is within a business, profit or nonprofit organization, institution or government and who is the recipient of business coaching. (WABC, 2013)

The Client/Coachee is the person(s) being coached. (ICF, 2015)

‘Long-term business coaching engagement for the purposes of this project:

The definition that I stated in my research proposal is: ‘Providing business coaching services to an individual or team for a total of two or more years, whether continuously, or cumulatively’ (Campagna, 2015).

I came to this working definition as a result of examining the literature for ‘typical’ coaching engagement timeframes. Various duration intervals emerged, though not specifically related to business in all cases. The intention was to identify a minimum timeframe to define long-term coaching which would clearly exceed any typical parameters considered for a coaching engagement. (see section 2.6 for expanded discussion on this topic).

Returners

Coaching clients who reconnect with the same business coach after a hiatus. That hiatus could represent weeks, months, or years.

Tools

A metaphor which meant to describe the many stratagems used by coaches to work with a client.

1.11 Organization of this dissertation

This report is organized as follows:

Chapter 2-Literature Review Informing the Research Question: Exploration and discussion of the literature on long-term coaching engagements and related coaching subjects. This includes an overview of research to date, definition of coaching as an activity, the coaching interaction, the average or usual duration of coaching engagements, and definitions related to coaching and long-term coaching engagements. The chapter will conclude with the aims and objectives of this project.

Chapter 3-Methodology and Activity: Describes the methodology utilized, the rationale for choices made throughout the project and activities before and during data collection. This chapter includes the specifics of the research design and resulting follow through as well as the approach taken for coding and analyzing data. Furthermore, this section outlines the limitations and delimitations of this research and ethical considerations will be detailed that arose.

Chapter 4-Survey Findings and Discussion: Findings that emanated from the survey will be presented and discussed.

Chapter 5-Interview Findings and Discussion: Findings and corresponding themes that emerged from the one-on-one interviews are presented in the first half of this chapter. Discussion on themes that came to light from the interviews are presented in the second half of the chapter.

Chapter 6-Combined Data Summary: Discussion and data analysis from the survey and interviews conducted.

Chapter 7-Conclusions: Arrived at based on this research, these conclusions answer the research question and demonstrate the effect of this project and consequent changes to my coaching business. Recommendations for future research are offered.

Chapter 8-Reflexive examination: Showing my personal learnings derived from this research and from my entire doctoral journey.

1.12 Summary

This chapter has presented the scope and focus of the research question for this project. I have included an explanation of why the question is timely and how the answers identified in the data will be a contribution to the wider coaching industry as well as to my own coaching practice. Examining my background as the business professional conducting the research and my position within the coaching industry in this chapter has been a reflective and enlightening exercise. Carrying out this process has reaffirmed how it is that my background has led me to posing this research question.

An overview of the occupation of coaching has been provided along with an account of some of the opinions ‘in the air’ related to long-term coaching. I am confident that the findings from this project will demystify some unsubstantiated beliefs and paradigms regarding long-term coaching engagements while at the same time, confirming others.

This project will explore the effect of long-term business coaching engagements on the coach's process and approach. The question was formulated from my thirty years' experience as a business coach serving longevity clients combined with my curiosity to discover whether there are other coaches like me who are involved in long-term engagements and, if so, whether those engagements differed from typical coaching client relationships. Both the question asked, and my curiosity have been answered because of this research as will be discussed in chapter 7 along with recommendations on where to go from here.

Chapter 2 – Literature Review Informing the Research Question

This chapter provides a brief synopsis outlining the foundation of this research. Here I give an overview of the current knowledge base relating to the field of coaching with particular focus on the sub-topic of long-term coaching engagements. An examination of coaching literature has yielded only a small number of publications that even mention the topic of long-term business coaching engagements and it is interesting to note that these texts have all been authored within the last two decades (see section 2.7).

It is reasonable to ask and reflect on why the subject of long-term coaching engagements has barely been researched or written about until more recently. One explanation could be that such an investigation may not have been deemed important by most researchers. Coaching is a relatively young industry (see section 1.8) openly engaged with striving toward becoming a profession (Fillery-Travis & Collins, 2017; Grant & Cavanagh, 2004; Lane et al., 2014). It is possible that addressing and resolving industry inconsistencies, such as standardization of coaching accreditation, certification, industry ethics, and agreement on the definition of what coaching is, may have taken precedence in order to help frame coaching as a profession. Whereas scholarly activity viewed as being indirectly related to this aim has not been at the forefront of research.

Another possibility for this lack of academic exploration on long-term coaching engagements is that research on the subject may have been premature up until now. As the industry of 'organizational coaching' (Bachkirova & Borrington, 2018, p. 4) has grown and expanded, its practices, processes and approaches are being more thoroughly reviewed and documented. It is plausible that until recently, long-term engagements have not been explored because they simply did not occur with frequency in the coaching world and therefore have not attracted academic attention. Though long-term coaching engagements have been acknowledged in the literature as taking place fifteen years ago (Grant & Zackon, 2004) it appears that they have been viewed as occasional anomalies (see section 2.6).

An additional consideration is related to a selling point sometimes put forward which characterizes coaching as a means to find focused answers to immediate business problems (Gray, 2006) or as a 'quick fix' (Berglas, 2002, p. 4) for certain issues found in organizations. Researchers may have focused on approaches that have appeared to appeal to the business world, viewing the topic of long-term coaching as a product that seems to currently possess less marketing draw than a more rapid-fire short-term approach. Today however, as will be shown, corporations are sometimes willing to pay for these extended engagements and a plethora of coaches globally have first-hand knowledge and understanding of the phenomenon of working with longevity clients. The knowledge and experience of these coaches have yielded thoughts, opinions, and habits of practice in relation to their longevity clients (see chapters 4 and 5). Whatever the reasons for the scarcity of research on this subject to date, this researcher believes that the time is overdue for investigation into long-term coaching approaches.

From the process of carrying out the literature review six areas of research have been identified:

- Overview of research conducted about the field of coaching.
- Description of the practice coaching, i.e. the activity involved.
- Research on the relational aspect of the coaching interaction.
- Definition of the role of coaching practitioners in relation to business and organizations.
- Data collection on the duration of business coaching engagements.
- Long-term coaching engagements – the discussion to date

Though there is a scarcity of literature specific to this research topic, there is a recognized and expanding foundation of literature in the arena of coaching from which to draw on for this review. As section 2.2 establishes, interest in researching coaching has accelerated over the last twenty years (Lane et al., 2014) and increasing academic rigor is being applied to the subject.

2.1 The literature review process

Conventional Approaches for a Literature Review

Literature reviews generally occur in two forms: firstly, as a means of framing and understanding the knowledge known in relation to a research question and sometimes as a standalone article which provides an overview of what is known about a particular topic

(Pan, 2003). This literature review has been conducted in the context of the project question, not as a standalone document.

Purposes for a literature review can be multi-faceted (Gray, 2009). They can include:

- Examining previous research for ideas on how to develop the scope and design of a project.
- Identifying methodologies used to explore the topic to help determine the method best suited to the research question.
- Consideration for how others have explored the topic and what they have learned.
- Discovering what is known about the topic and, discovering what gaps may exist in that foundation of knowledge.

The long-established academic approach for conducting research is to perform a search followed by assessment of literature available for the topic being researched. This approach establishes a foundation of knowledge from which to move forward from (Bloomberg & Volpe, 2016; Costley & Nottingham, 2018; Gray, 2009; 2014; Merriam, 2009; Pan, 2003).

Academic researchers, particularly new ones, are often advised to spend time in their academic institution's library as a starting point (Bloomberg & Volpe, 2016; Gray, 2014). These institutions usually have access to dozens of databases along with subscriptions to peer reviewed journals and other materials relevant to the topic being researched and thus are a rich source for literature searches. In today's digital age, both libraries and the internet are viewed by researchers as resources which are likely to yield a rich array of information. Such information includes published and professional sources, peer-reviewed articles, academic papers such as dissertations, unpublished writings, books, speeches, videos and more.

Scholars designing a research project often begin by first identifying a broad topic then studying and assessing the literature related to that topic as a means of constructing the research question (Merriam, 2009; Strauss & Corbin, 1998). Generally, peer-reviewed articles and papers are favored over books and other nonacademic sources (i.e. interviews, diaries, videos, speeches, manuscripts, etc.) though all may have a place in the 'discussion' generated by the literature (Gray, 2009; 2014). Researchers are encouraged and expected to continue to assess and review identified literature as well as to iteratively check for new sources. This activity is especially relevant near the end of a project to confirm a command of expanding relevant literature (Bloomberg & Volpe, 2016).

The literature review is expected to assist the researcher and the reader by informing them about what is known regarding the topic being explored, thus providing a base from which researcher can synthesize that material with new data collected.

My Literature Review Journey

I had studied and explored how to conduct a literature review for a dissertation as has been described above and recognized that there were two initial decisions to consider when beginning the process of conducting this review. Firstly, which topics and areas of interest I would pursue and second, how I would access the literature that pertained to what I was looking for. The first was settled on quickly; my broad topic of interest is the activity of business coaching within long-term engagements which is a subset of the category of coaching (excluding sports) overall. Having pinpointed the topic, the next step was to learn how to find and retrieve literature related to it.

Since I am a distance scholar living in another country, spending time in my university library as proposed above was not possible. However, many of the library's assets have been digitized and are available via the internet, thus rendering my university library an important resource for my search as Bloomberg & Volpe (2016) and Gray (2014) suggested. To skillfully take advantage of that resource as a new researcher, I attended two online webinars offered by the university regarding how to conduct research using the library remotely and also arranged a one-on-one tutoring session with a university librarian to sharpen my search skills through the library and elsewhere. In addition, I received guidance from my advisor, continued reading books, book sections and articles related to literature reviews and polled friends and coaching colleagues who have conducted professional research about methods of identifying and retrieving relevant information (Randolph, 2009).

I began this review with phrases I deemed common to my topic. The initial search terms I chose were 'long-term coaching,' 'business coaching,' 'business coaching processes,' 'executive coaching' and 'executive coaching processes.' The first yielded very little whilst the others yielded a great deal. However almost none of the results were related to long-term coaching engagements. I noted the gap in the literature on long-term business coaching and realized that this project is exploring new territory. Recognizing that I would need to examine the topic more broadly, I gradually expanded key search terms to include 'length of coaching engagements,' 'duration of coaching engagements,' 'duration and extension of the coaching contract,' 'coaching approach,' 'coaching associations,' 'coaching ethics,' 'the coaching relationship' and 'the history of coaching.' Results from these searches are detailed throughout this chapter.

Sources identified and explored include published academic research, coaching publications (peer reviewed and not), theses, articles, books, journals, websites, and private conversations with coaching professionals. It was an iterative process in which one source often led to another. A particularly rich resource has been the reference sections of others' work. Authors frequently synthesize or quote others' work and these citations then provided new sources for me to locate, review and consider. Knowing that secondary citations are not as well accepted as original works, I employed several techniques to locate primary sources; searching my university library (remotely), exploring Google Scholar, and spending days studying at a local university library (as a guest) so as to have access to its data bases and physical sources. My local public library has also been a helpful source for coaching literature because it has access to both public and private libraries across the country and the staff was able to locate and provide inter-library loans for many journals and books. When these techniques did not yield what I needed, on several occasions I was able to locate the authors of certain articles (via email) and most of them very kindly provided me with digital copies of what I was seeking. When all other avenues were exhausted, I resorted to purchasing books and journal articles in order to read them firsthand.

I created a catalogue of digital sources that are downloaded onto my computer (a wide array of information and data) so that I could locate and refer to them over the course of this project in an organized fashion. I also have handwritten notes from sources I could only borrow briefly, and in some instances, I copied relevant pages of published works to be able to cite and refer back to them accurately. I worked in this way because I am a kinesthetic learner, meaning that my natural tendency is to hold reading material it in my hands and physically mark it up. Finally, I have kept email folders of information exchanges with various sources, some of which are cited in this document.

As a researching practitioner (Costley & Nottingham, 2018), I came to this project being more familiar with professional sources of information such as books and popular coaching blogs rather than academic resources and I instinctively drew liberally from those familiar sources at the beginning of this literature review. However, over time I became informed, comfortable, and familiar with academic and peer reviewed material as evidenced by the references throughout this document. This evolution of my knowledge base from that of mostly a practitioner's understanding to that of including academic research rigor came about as the project progressed. That knowledge has expanded both the breadth of this project (the research) and my knowledge of the topic of business coaching (as a practitioner).

As recommended by several literature search authorities (Bloomberg & Volpe, 2016; Costley & Nottingham, 2018; Gray, 2014; Merriam, 2009; Randolph, 2009), I have continued to locate and review sources throughout the process of assembling this project. That step has proven fruitful in that new research has continued to be created. For example, newer surveys provided indication of a changing coaching landscape which led me to new information which is included in this chapter. Also, when possible, I communicated directly with authors of certain articles I had gathered early on and requested an update of opinion and statistics where it was available. The evidence of this fact can be found in the dates of the various citations.

2.2 Overview of research conducted on the coaching industry

Coaching is an expanding field of practice and interest that as previously mentioned, is aided by the growth in related research as it's volume and refinement furthers the industry's ostensible goal of maturing into a profession (Bennett, 2006; Fillery-Travis & Collins, 2017). This discussion will provide a brief summary of that foundation by identifying some of the literature reviews conducted to date with emphasis placed on the past two decades.

Interest in business coaching as a helping intervention became more widespread in the 1990's, though it was acknowledged as a useful service no less than one hundred years beforehand. Nineteenth century literature yields at least one pamphlet related to coaching in a business setting: Saville's *Civil Service Coach* (1881). Its stated purpose was to coach aspirant individuals about how to pass examinations required to obtain civil service positions. Fifty years later, an article was published discussing the advantages of using coaching within business management (Gorby, 1937). A total of ninety-two more articles, PhD theses and empirical studies were published about coaching throughout the remainder of the twentieth century, nearly half of them occurring in its final decade. The tenor of the research often focused on coaching as a management skill though a comparison with the profession of psychotherapy was also explored (Passmore & Fillery-Travis, 2011).

The investigation into coaching practices continued to expand into the 21st century with the first wide-ranging review of coaching literature published in 2001. The authors Kampa-Kokesch and Anderson offer some historical background on the development of executive coaching and also explore some of the lively debate that was (and still is) occurring between professional coaching associations and the fields of coaching and psychology. As a result of assessing the literature, the authors identify six themes they recommend for further exploration: definitions/standards, purpose, techniques/methodologies, coaching credentials, finding a coach, and the recipients of coaching services (Kampa-Kokesch & Anderson, 2001, p. 208).

The pace of coaching research output accelerated over the years following Kampa-Kokesch and Anderson's (2001) seminal report. In 2005 a literature review on executive coaching in the workplace was published encompassing seventy-eight articles garnered from both academic and professional journals and magazines (Joo, 2005). This publication features eleven research articles; six of which are quantitative (only one using inferential statistics) and five that are qualitative. The aggregation and assessment of these articles led Joo to comment on the dearth of empirical research on executive coaching available at the time.

Joo provided a number of definitions for executive coaching and its purpose, differentiating counseling (therapy) from consulting (coaching), outlining differences between mentoring and executive coaching, and concluding the work by providing a conceptual framework for successful executive coaching.

Passmore and Fillery-Travis (2011) chose to build on Kampa-Kokesch and Anderson's review by providing an updated version focusing on executive coaching. These authors began by acknowledging Kampa-Kokesch and Anderson's declaration that there is not agreed definition of what coaching is, commenting on how this was still the case a decade later. Five categories of study are explored in the article which are: coach behavior, client behavior, coach-client relationship, coaching impact and the authors’ hopes for the progression of coaching research in the coming decade (defined as being through the year 2020). The authors outline six broad themes to consider for on-going coaching research, noting that there is a progression of research maturity occurring within the coaching industry as its focus moves from ‘the exploration and definition phase of research’ into ‘theory development and testing’ (2011, p.80). These themes are as follows:

- Selection of coaching as an intervention
- Coaching cultures and organizational change
- Critical features of the coaching relationship
- Client-readiness for change and present issues
- Coach development through the coaching process
- Coaching as an agent for producing social results

Passmore and Fillery-Travis (2011) further opine that one of the outputs of research in any field is to identify and define the unique knowledge base that sets an industry or profession apart from other helping interventions. Indeed, they contend that this unique knowledge base is a necessary step for coaching to eventually become codified as a profession.

An article in 2015 positioned the field of coaching as being a new and emerging science (Schutte & Steyn, 2015). The authors conducted a literature review analyzing thirty-six articles focusing on both finding and creating building blocks of knowledge in an effort toward establishing business coaching as an independent academic discipline. The article positions coaching as still being a newcomer to the world of business and in need of more academic research to augment the systemization of the growing body of coaching literature. Other literature reviews from the preceding twenty years were explored, though inclusion was not comprehensive. As example, it does not include Passmore and Fillery-Travis’ 2011 review detailed earlier. The authors conclude by providing their own definition of executive coaching based on their analysis of the body of work reviewed (see section 2.3).

Athanasopoulou and Dopson’s 2018 literature review examines executive coaching outcome studies published in peer-reviewed journals. Their study focuses on the work of external executive coaches, separate and distinct from other types such as internal or management coaches. As in previous literature reviews discussed, the authors explore various definitions of executive coaching from several coaching sources. Beginning with the Kampa-Kokesch and Anderson literature review, the authors systematically examine the research available, focusing on the outcome studies. Their aim was to explore the full set of 110 quantitative and qualitative outcome studies and to shed light on weaknesses in some of the research designs for the purpose of improving future academic output. They conclude that too much emphasis is being placed on coaching return-on-investment (ROI) and on the characterization of coaching as an individual intervention. Athanasopoulou and Dopson's recommendations are that more prominence is given to reframing executive coaching as a social intervention involving the coach, the client and the organization being served.

Surveys have been growing in popularity as a form of research within the coaching industry. An internet search yielded surveys related to coaching going back to 2001. Some of these surveys are singular and related to a specific area of research while others were conducted by professional coaching organizations as a means of 'taking the pulse' of the industry. Sherpa Coaching is one example of an organization that has conducted annual surveys on the practice of coaching since 2005 (Sherpa Coaching, LLC, 2019) (see the Glossary) while the International Coach Federation (ICF) (2012, 2016) is another example, having conducted at least two coaching surveys within the past decade. Several other coaching organizations have generated surveys as well, however, the statistics generated are often a challenge to compare as the questions asked are not uniform in most cases, and the participant profile varies from survey to survey. Examination of several of these coaching surveys and their results are discussed in chapter 4.

The sampling of literature explored in this section illustrates the growing foundation of coaching knowledge being accumulated and also the increasing rigor being applied to coaching research. Section 2.3 examines what the activity of coaching is and how it has evolved to the way in which it is viewed today.

2.3 Exploring the activity of coaching, what does it involve?

It is reasonable to begin this discussion with the question: what does it mean *to coach*? Given that words have varied meanings and definitions, nearly always related to their context and the culture in which they are used, it is important not to assume an understanding but to examine terminology in more depth. I begin this task by providing the following etymological description:

> *'The very first use of the word "coach" in English occurred in the 1500's to refer to a particular kind of carriage. (It still does.) Hence the root meaning of the verb "to coach:" to convey a valued person from where he or she was to where he or she wanted to be.'* (Evered & Selman, 1989, p. 32)

Herein is a good example of context as this double meaning provides a salient descriptor not only for a sixteenth century transport conveyance, but also for a modern-day occupation (Fillery-Travis & Collins, 2017; Hicks, 2017; Stec, 2012; Stout-Rostron, 2014). Indeed, Stern (2004) directly discusses this extension of meanings, commenting on the way in which the word *coach* has traveled along several roads of use over time. For example: academic coaching to convey the student through exams, sports coaching to carry the athlete to victory and the recent evolution of the word, executive or business coaching to convey an executive from one point to another.

De Haan (2008) likewise directly refers to this same double meaning, stating that today a coach is often viewed as being a catalyst to convey a client from where they are to where they want to go. Examining the word *coach* even further, de Haan suggests that its evolving etymology correlates with at least four coaching activities: A transport or change expert (facilitating a client from A to B), an educator (improving someone's performance), a therapist (sometimes referred to as remedial coaching), and an organization developer who supports individuals within that organization.

Clearly, the meaning of the phrase *to coach* and what such an activity entails has evolved over the centuries. However, at the same time it has retained the essence of its original meaning of carrying a valued individual on a journey from where they are to where they want to go (Evered & Selman, 1989). This *conveyance* of an individual via the activity of coaching has also been analogously compared to the coach serving as a guide; an individual who assists in transporting clients along the path of their choosing, navigating along the track's twists and turns until the client reaches their destination. (Hicks, 2017). There is general agreement in today's business world, linguistic comparisons aside, that coaches provide a valuable service in assisting clients to develop an awareness not only of their behaviors, but to, as Brock says, ‘raise awareness (of the client) so that each is at conscious choice’ (2012, p. 1).

Copious definitions and descriptions of what ‘coaching’ is and what it is used for have been offered by scholars and practitioners throughout the world (Gray, 2006) (also see section 1.8). In addition to the two definitions regarding coaching outlined in section 1.10, below are four additional clear and straightforward definitions. These describe the activity and also serve to demonstrate the duality between the similarities and at the same time, lack of cohesion within the industry:

‘Coaching is a human development process that involves structured, focused interactions and the use of appropriate strategies, tools and techniques to promote desirable and sustainable change for the benefit of the coachee and potentially other stakeholders.’ (Cox et al., 2014, p. 1)

‘Business coaching is essentially about the results experienced through the dynamic relationship experienced between coach and client, and how those results impact on individual, team and organizational performance’ (Stout-Rostron, 2014, p. 14).

‘Business coaching is a one-on-one relationship with the purpose to change behavior through learning to improve organisational effectiveness by setting goals to achieve the desired results.’ (Schutte & Steyn, 2015, p. 8)

‘A Socratic-based future-focused dialogue between a facilitator (coach) and a participant (coachee/client), where the facilitator uses open questions, active listening, summaries and reflections which are aimed at stimulating the self-awareness and personal responsibility of the participant.’ (Passmore et al, 2017, p. 12)

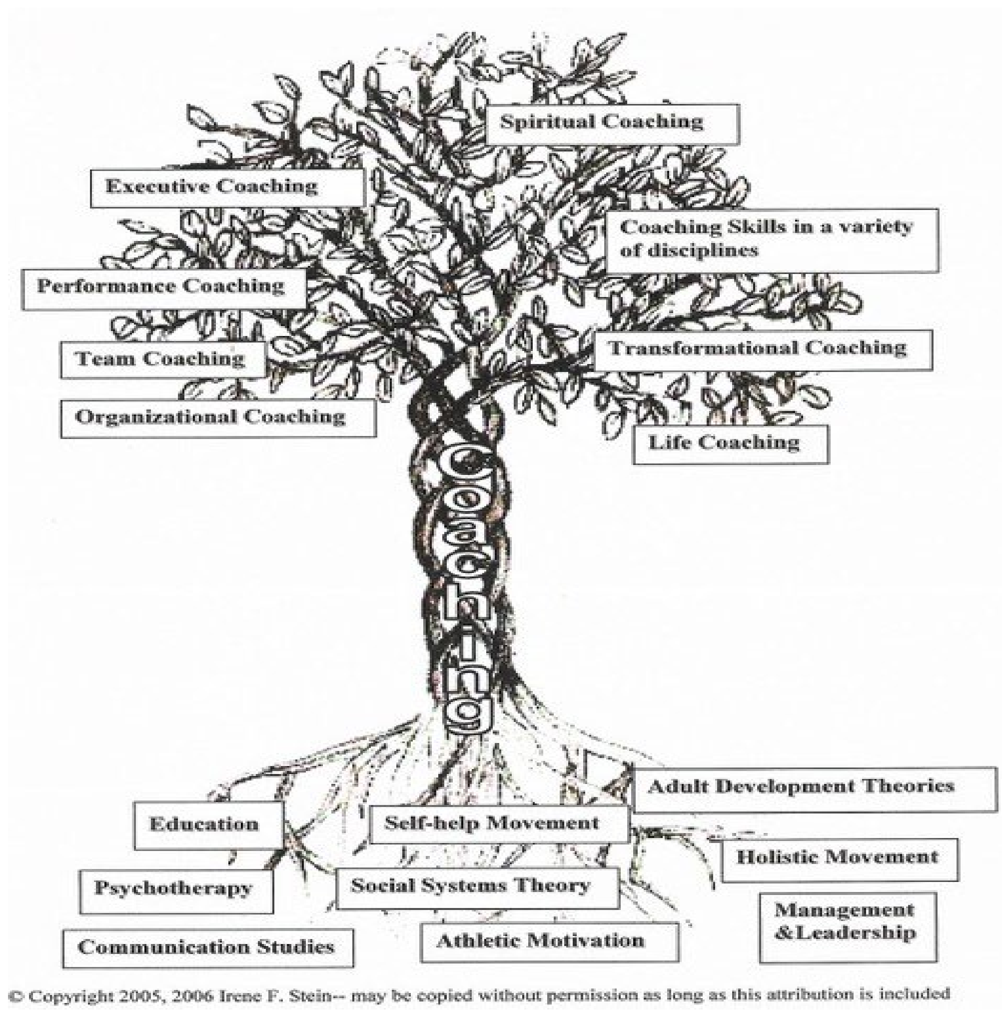
Scholars of modern-day coaching observe that while the industry is a late 20th century phenomenon, the activity itself (regardless of the descriptor used), has been occurring in numerous forms for thousands of years. As an example, the Greek teacher and philosopher Socrates (469-399 BC) is often referred to as being a coach, or being *coach-like* in the way that he utilized questions as a teaching method to encourage his students to find their own answers (Brock, 2012; de Haan, 2008; Hicks, 2017; Rogers, 2016; Stout-Rostron, 2014; Williams et al., 2014). When thinking about the activity we call coaching today, we need only consider the supportive and often preparatory activities of apprenticeship, mentoring, internship, shadowing, training, and even negotiating family dynamics to confirm that humanity has been helping its members grow and adjust in one fashion or another since the beginning of time (Bachkirova et al., 2017).

The term *coach*, in the form that it is commonly used today, became recognized and used in differing types of organizations over the centuries, albeit slowly. As illustration, Oxford University utilized the term 'coach' as slang for a private tutor as early as 1830 to carry a student through their exams (Etymonline n.d.). As noted earlier, acknowledgement of coaching as a training technique in the realms of business and government was documented by Saville (1881) who authored a book suggesting coaching as an assist for those aspiring to a civil service career in England (also in Stec, 2012). Suffice to say that the concept of coaching and being a coach in the realms of organizational settings has been incubating for a long time. Within the past several decades, this concept has been carried along more rapidly by the socioeconomic evolution of our ever-changing world (Brock, 2010).

Most of us are familiar with the vocation of coaching within the sphere of athletic sports due to their popularity worldwide. Noting that nearly all top sports performers work with coaches, some have argued that leading performers in business should also have access to the same type of attentive assistance to support business development (Blakey & Day, 2012). A decade earlier, also making a comparison between business development and sports, Peltier theorized that the concept of coaching may have come to be utilized in the business world instead of 'executive counseling: or workplace psychology to emulate the feeling of sports. It is believed that hard hitting executives often associate the concept of counseling with weakness while the concept of coaching seems to connotate successful and winning teams and performance' (2001, p. 170). Whilst Peltier draws a thoughtful analogy here, as discussed earlier, relating the concept of coaching to the world of business occurred as far back as the 1800s. Coaching as an activity and service within the world of business is both grounded in and yet distinct from a number of humanistic disciplines. Figure 2.1 provides a visual identification of many of the roots that feed into the occupation of coaching (Brock, 2012, p. 8).

Acknowledging the roots of the metaphorical coaching tree, Shybrow and Wildflower (2011) along with Hicks (2017) and others nonetheless assert that modern day coaching derives its main theoretical underpinnings from the field of psychology. Though the vast and well-established field of psychology is undisputedly a powerful contributor to the field, as the graphic tree depiction attests its origins are comprised of various multidisciplinary approaches. Indeed, the field of psychology itself derives its own underpinnings from a number of humanistic modalities including philosophy, neuroscience, sociology, and the medical field (Engel, 2008). It is the unique combination and melding of all these elements from varying sources that ultimately yields the activity of coaching, both as an applied field of practice and as a social phenomenon (Brock, 2012; Cox et al., 2014; Hicks, 2017).

Figure 2-1 Roots and blooms of the tree of coaching



There are also many variations and forms of the actual activity of coaching itself (Bachkirova & Borrington, 2018). Whilst it cannot and should not be a one-size-fits-all activity, many coaching scholars contend that there are certain components common to all coaching processes. Wasylyshyn (2014) refers to three of these components, traction, trust, and truth telling as meta factors. She asserts that these, along with the working alliance between coach and client are all central to achieving a positive outcome from the coaching experience. Most types of helping modalities have skillsets that overlap. In particular, de Haan (2008a) homed in on counseling, consulting, and mentoring as three types of helping interventions that are sometimes confused with coaching.

<u>Counseling</u> This is a word sometimes used interchangeably with the terms ‘therapy’ and ‘psychotherapy.’ It most often connotes an emphasis on powerful and non-judgmental listening without a call to action and is thus different from coaching (Rogers, 2016). Extrapolating further, the term therapy is sometimes used interchangeably with the term psychotherapy which does not represent a single activity, but rather a series of theories and practices (Brock, 2012).

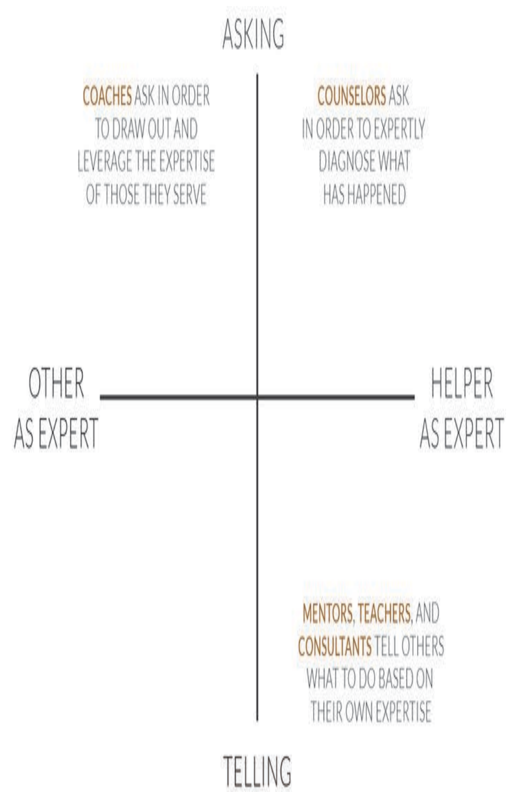
When distinguishing the practices of psychotherapy from coaching, de Haan (2008a) has noted some key differences. Chief among these is that coachees, unlike therapy clients, do not seek to progress from poor to average, but rather, from well-performing to excellent (p. 48). Further, coaching is work-and-organization oriented whilst therapy addresses work as only one aspect of the client’s life.

<u>Consulting</u> The industry of consulting blossomed in the business world based on a theory that objective experts from outside could better enhance the goals and performance of an organization (Sheth & Sobel, 2000). Consultants within the organizational world are generally paid to provide guidance and answers for a specific area of expertise. However, this generalization is sometimes blurred with other helping modalities such as coaching when the parties involved use approaches such as appreciative inquiry and process consultation which are approaches used within both industries (Brock, 2012). Overall, a coach approaches the client relationship with an intention to ‘enable solutions rather than supply them’ (Sheth & Sobel, 2000, p. 30) while consultants are paid to bring in and provide answers, that is, to give advice related to a specific area of expertise (Blakey & Day, 2012).

<u>Mentoring</u> This activity is typically conducted within a dyadic relationship in which the mentor is usually of higher rank and experience than the mentee, providing guidance and advice to the less experienced colleague. In contrast, coaching is considered to generate an egalitarian relationship that, in its traditional form, does not involve offering advice (Blakey & Day, 2012; Hicks, 2017). Some scholars have distinguished coaching from mentoring by defining coaching as a dialogue between a coach and client that is future-based with the aim

of stimulating self-awareness and personal responsibility, whereas mentoring takes place between an experienced individual and a junior or less experienced individual for the purpose of guidance, advice and support that will assist in the mentee's development (Blakey & Day, 2012; Passmore et al., 2017). Figure 2.2 below illustrates some of the distinctions among these three helping modalities (Conexus, 2014).

Figure 2-2 Distinctions in helping interventions



Presently, this is an exciting era for the field of coaching as it is moving toward a new stage of maturation and coaches are growing in numbers globally (Jarvis et al., 2006). As illustration, there were approximately 53,300 coaches (all categories excepting sports) practicing worldwide in 2016, up from 41,300 practitioners in 2012 as reported in surveys conducted by the ICF (2016, 2012).

Though the growth reported is impressive, it must be noted that most association and industry studies are designed to capture the number of active coaches through membership in those various coaching organizations and as a result they almost certainly do not represent the full coaching population. Furthermore, the coaching industry is currently unregulated;

there is not a barrier to entry such as licensing or unified accreditation. Training is not mandatory meaning that anyone can call themselves a coach and describe anything they do as *coaching* (Allen, 2016; Bresser & Wilson, 2010; Gromley & van Nieuwerburgh, 2014; Judge & Cowell, 1997; Liljenstrand & Nebeker, 2008). Nor is there a central and legally binding definition of coaching as demonstrated at the beginning of this section as well as in section 1.10.

Thus, the total number of people calling themselves coaches today is unknown. In reality, the number of coaches practicing their craft likely exceeds the numbers reported by ICF. As far back as 2009, the Global Coaching Survey 2008/2009 offered a 'rough final estimate of 45,000-50,000 coaches' (2009, p. 7). Later, in 2011, an article in the Peer Review made the case for there being an estimated 130,000 coaching practitioners worldwide (Carr, 2011).

Setting aside the specific magnitude of the coaching population, the coaching industry is clearly expanding in size and impact. There is research, dialogue, and debate throughout the world today related to the current and future status of coaching. An unanswered question to date is whether coaching will remain an occupation or if it will become regulated and standardized in order to attain the status of profession (Fillery-Travis & Collins, 2017; Grant & Cavanagh, 2004; Lane et al., 2014). At this juncture, the answer to this question is unknown. However, what can be said is that coaching research is increasing in volume and scope (Lane et al., 2014) as new topics of interest are emerging and being explored within the academic field. This paper examines one such topic: long-term business coaching engagements.

International organizations have been established that promote and set standards for coaching practice as well as offering their own detailed descriptions and definitions of what constitutes coaching today, therefore aiding the work of coaching scholars. Among these well-established groups are the European Mentoring and Coaching Council (EMCC), Coaches and Mentors of South Africa (COMENSA), and the International Coach Federation (ICF). On examining the definitions provided by these organizations I have deliberately not included them in this project literature review. While it is this researcher's opinion that each is an accurate depiction, they have been excluded because they intentionally define *all* coaching activity and also non-coaching activity (i.e. wellness coaching, life coaching, parental coaching, sales coaching, meditation coaching, business coaching, executive coaching, mentoring, and many others) meaning that these descriptors are not focused specifically enough for the purposes of this research.

This project is limited to the sub-set of coaching activity that has the express purpose of benefitting both the client being coached, and the organization they are is associated with (public, private, profit, not-for-profit, governmental, and academic), as defined in section 1.10. This review therefore focuses on discussion related to coaches working with individuals and teams in relation to their role(s) in an organization. Following this guideline, the way in which 'business coaching' is understood within this project is based on the Worldwide Association of Business Coaches (WABC) definition:

> *Business coaching is the process of engaging in regular, structured conversation with a "client": an individual or team who is within a business, profit or nonprofit organization, institution or government and who is the recipient of business coaching. The goal is to enhance the client's awareness and behavior so as to achieve business objectives for both the client and their organization.* (WABC, 2007)

Extrapolating on the boundaries of this discussion, it is important to emphasize the distinction between business coaching and other coaching work. Clutterbuck and Megginson are clear in their opinions on this topic:

> *One of the most pernicious myths about coaching is the coaches need no contextual knowledge of the client's world. Whether born of self-aggrandizement or a mechanistic view of coaching, this is manifestly untrue, on two counts: client safety (and hence ethicality) and efficacy. (2011, p. 304)*

In other words, a business coach must possess at a minimum a broad understanding of the client's organizational world and an ability to link that world to the client's goals. This understanding, and corresponding coaching abilities is what distinguishes a business coach from other typologies of coaching (see section 2.5 for a discussion on the term 'business coach.').

However, it is equally important to note that regardless of the purpose intended for a coaching engagement, there are factors that are common to all coaching conversations. These include the relationship between coach and client, a philosophy and approach to empowerment, the coach's goal to work with the client in order to increase confidence and commitment, the selection of a process or model chosen and utilized by the coach as a framework to support and challenge clients, as well as a commitment to facilitating growth and awareness through incisive questioning (Hicks, 2017).

Encompassing these factors, Clutterbuck and Megginson (2011) suggest that a coach progresses through three stages in the process of honing their craft before arriving at the final fourth stage signifying ‘coach maturity,’ or that of becoming (their term) a systemic eclectic coach. They posit that reaching coach maturity requires a combination of adequate time in the field and an immense amount of reflection and experimentation, resulting in the coach being able to adapt their approach in the moment when working with a client.

Figure 2.3 provides a description of these four stages taken from Clutterbuck and Megginson (2011, p. 305):

Figure 2-3 Stages of Coaching Maturity

Four Mind-Sets for Coaching

(Clutterbuck & Megginson 2011)

Coaching Approach	Style	Critical Questions
Models based	Control	How do I take the client where I think he needs to go? How do I adapt my technique or model to this circumstance?
Process based	Contain	How do I give enough control to the client and still retain a purposeful conversation? What's the best way to apply my process in this instance?
Philosophy based	Facilitate	What can I do to help the client do this for herself? How do I contextualize the client's issue within the perspective of my philosophy or discipline?
Systemic eclectic	Enable	Are we both relaxed enough to allow the issue and the solution to emerge in whatever way they will? Do I need to apply any techniques or processes at all? If I do, what does the client context tell me about how to select from the wide choice available to me

Executive coach Gordon (2017) describes how Clutterbuck and Megginson’s model of coaching maturity resonates with his own experience as he reflects on his coaching journey in a review of the four stages. Gordon points out that at the fourth stage of coach maturity, the coach is able to question their own assumptions and embrace the ambiguity and therefore the uncertainty of the questioning.

2.4 The relational aspect of the coaching interaction

Business coaching is considered to be a professional development and performance enhancement process and has become a significant factor in the professional development of executives and managers (Gray, 2006) as established in section 2.2. Some of the elements that comprise a coach's interaction with a client have been explored in other sections of this chapter and elsewhere in this document such as checking for chemistry before choosing to work together, contracting, the use of assessments and the length of the engagement. One element of the coaching interaction that seems to stand out above the others is the relationship between the coach and the client. This coaching component is particularly relevant to this research and therefore it is explored here in detail.

After assessing the many literary sources that investigate coaching, it can be concluded that there is firm agreement on the importance of the relationship between coach and client as a factor for successful coaching outcomes (Bachkirova & Borrington, 2018; de Haan, 2008; de Haan & Duckworth, 2012; Kampa,-Kokesch & Anderson, 2001; Passmore & Fillery-Travis, 2011; Rogers, 2016; Stout-Rostron, 2014). In many of these discussions the relational interaction in coaching is placed in direct comparison with research on the psychotherapeutic relationship. This contrast is reasonable given that coaching has evolved with and borrowed from a number of humanistic interventions including psychotherapy as previously described (Brock, 2012; de Haan, 2008a; Hawkins, 2015). However, as the boundaries of activity for this project are purely concerned with aspects of coaching, this current discussion addresses only the literature focused on coaching relationships.

The academic and professional coaching literature is both ubiquitous and near unanimous on the topic of the relationship between coach and client. As early as 1989 when coaching was in its infancy, Evered and Selman gave a very specific depiction of what the coaching relationship entails: 'Unlike other types of supportive relationships (counselor, friend, instructor, trainer, mentor, etc.) coaching calls for a high degree of interpersonal risk and trust on the part of both the coach and the person who is coached' (p. 28). In a 2002 study exploring the impact of coaching combined with 360-degree feedback, the researchers noted that, ‘the factor of greatest impact was felt to be the relationship with the coach’ (Jarvis et al., 2006, p. 95). Furthermore, and demonstrating how the importance of relationship has continued to take precedence in the literature, in his book *Relational Coaching* (2008a) de Haan asserts that ‘…the only genuinely effective ingredient that we are able to influence, (is) the coaching relationship’ (p. viii). Finally, to complete this set of references, Baron and Morin also contend that the coach-coachee relationship is ‘a key process variable’ (2009, p. 86). These quotes demonstrate the overall consistency and affirmation on this matter within the literature.

Exploring executive (business) coaching, it has been noted that: ‘The (coaching) alliance forms, or emerges, as a result of the coach’s extensive efforts on her own introspection and reflective understanding of the way that she occurs for her client in the relationship’ (Hernez-Broome & Boyce, 2011, p. 170). Wasylyshyn (2014) also confirms that within any coaching process the quality of the working alliance is essential to a positive outcome. She further opined that when coaching senior executives, ‘the coach…is not trapped in a lock-step, company-endorsed model with a ceiling on engagement length. The coaching…is more relational than transactional’ (p. 194). In a 2016 report, researcher Wellbelove states that ‘the most important factor that determines success of a coaching process remains the quality of the client-coach relationship’ (Wellbelove, 2016, p. 6).

Whilst there is ‘near unanimous agreement’ on the importance and positivity of the relationship formed by the coaching dyad, concerns and cautions have also been raised. Berglas (2002) notes that when a coach gains the trust and confidence of high-ranking executives, the coach is in a position to wield great power within an organization, sometimes with disastrous results. Peterson (2011) observed that when a relationship is well established, the coach’s interaction might become more personal making them reluctant to raise issues and offer difficult feedback. Blakey and Day (2012) have suggested that unfettered relationships between coach and client can amount to collusion instead of effective coaching. Finally, one study (Henriques, et al., 2017) concludes that too much relational warmth early on in a coaching engagement was a negative factor in generating short-term performance outcomes. These observations could be construed to serve as testament to the need for quality training on the topics of relationship progression and on-going vigilance for coaching practitioners, perhaps even more so when working with long-term clients. The following section explores another topic relevant to this research, examining the roles of coaching practitioners in organizations.

2.5 Defining coaching practitioners in business and organizations

As we have seen, coaching practitioners working within the realms of profit and non-profit business sectors utilize many titles, labels, and descriptors to designate their position and the work that they do. Mirroring the lack of standardization within the coaching industry itself, each title may or may not connote the same meaning from user to user. In particular, the popular industry titles 'business coach' and 'executive coach' are used interchangeably by some and viewed as being distinct by others. It is important to spend time outlining these meanings not only to gain a clear terminology for this research, but furthermore, so that this investigation aides the task of honing and making distinct the practice of business coaching. Following is a sampling of definitions and descriptions from several established coaching related sources:

The term 'business coach' is employed as an umbrella phrase within an ICF survey to encompass the following coaching categories: leadership, business/organizations, executive, and small business (International Coach Federation, 2012).

The Business Success Coach Network distinguish between titles when they define the term executive coaching as 'leadership coaching' while separately describing business coaching as 'focused on creating a successful business' (2012, n.p.).

Underhill et al. offer a succinct definition of executive coaching: 'Executive coaching is the one-to-one development of an organizational leader' (2012, p.8). In this example, the term 'business coaching' is not mentioned.

Wikipedia poses an inclusive definition of coaching within organizations: 'Business coaching is a type of personal or human resource development. It provides positive support, feedback, and advice on an individual or group basis to improve their personal effectiveness in the business setting. Business coaching includes executive coaching, corporate coaching and leadership coaching' (Wikipedia, 2019).

In dissenting contrast to several of these definitions, Sherpa's 10th Annual Coaching Survey (Sherpa Coaching, 2015) makes a clear distinction between the two titles; 'it's not clear to everyone what executive coaching really is. Let's draw some lines. In business, there are two general fields of endeavor that are referred to as coaching' (2015, p. 5). These, the survey continues, are business coaching and executive coaching. In figure 2.4, taken from the Sherpa survey, these fields are delineated.

Figure 2-4 Executive Coaching versus Business Coaching

Discipline	Executive Coaching	Business Coaching
Emphasis	Business behavior	Strategy, tactics, operations
Focus	Soft skills	Hard skills
Examples	Communication Executive presence	Finance Technical training
Training	Non-academic programs written specifically for coaches.	Academic, degree-based business courses, plus industry-specific experience.

On its website, WABC employs a different frame of reference, offering a focus-related instead of tactical-related definition:

> *Business coaching enables the client to understand their role in achieving business success, and to enhance that role in ways that are measurable and sustainable. The coaching process may take different forms (e.g., individual or team coaching) and involve different goals (e.g., problem solving, career and succession planning, leadership/executive development, creation of high-performing teams), but throughout there is a clear focus on the business objectives of both the client and the organization. This dual focus is what distinguishes business coaching from other types of coaching.* (WABC, 2011)

WABC explains the activities engaged in by a coach when working with an organization regardless of the practitioner's particular:

> *'The process of engaging in regular, structured conversation with a client, with the goal of enhancing the client's awareness and behavior so as to achieve business objectives for both the client and their organization'* (WABC, 2013).

This last description succinctly encompasses the qualities embodied in the other definitions and is therefore the one chosen to define the term *business coaching* for this project.

2.6 Duration of business coaching engagements

To conduct a study that explores the impact of long-term coaching engagements on the process and approach of the business coach, it is necessary to identify and declare what constitutes a *long-term* business coaching engagement. In the same vein that there is not a universal definition of business coaching, neither is there agreement within the community concerning the typical duration of a coaching engagement.

This subject has been extensively investigated in coaching literature, though, as I have found throughout the literature, the results are sometimes conflicting and yield a wide array of suggested time frames (Fillery-Travis & Cox, 2014). What follows are samples of research and commentary on this subject. A chart is provided at the end of this section to summarize the data presented.

In 2004, a large-scale survey which targeted the ICF membership base was conducted revealing that 53.2% of coaches work with a client for six months or longer with the typical frequency of meetings being three times per month. Another finding shows that 5% of the respondents' clients had been in the coaching relationship for with them two years or longer (Grant & Zackon, 2004).

In another survey (Coutu & Kauffmann, 2009) participants were asked to provide the typical length of their coaching engagements. The most prevalent answer was seven to twelve months (45%), followed by two to six months (27.1%). The survey also reported that under two percent (1.4%) regularly worked with clients for two to three years and nearly three percent (2.9%) typically coached their clients for over three years.

A survey conducted by ICF in 2012, found that among its respondents, only 8% of all coaching engagements lasts longer than twelve months with the average duration being between four and six months. The survey further states that; ‘Coaches with a business-focused specialty are more likely to work on assignments lasting seven months or more (39%) compared to other coaching areas (29%)’ (International Coach Federation, 2012, p. 90). The study noted that coaching engagements lasting seven months or more occur more frequently among coaches dealing mainly with executives (47%) and less frequently where the client is a staff member (24%) or team leader (24%).The study also found that experienced coaches are more likely to be retained on coaching engagements lasting seven months or more. More than half of the surveyed coaches who had ten-plus years of experience (54%) said the average length of a typical engagement was more than six months, compared with one in five coaches (21%) with one to two years’ experience (International Coach Federation, 2012, pp. 90-91).

Goldsmith, a well-known coach in the international world of business, states that his typical client engagement ranges between six and eighteen months (Goldsmith, 2014; Goldsmith et al., 2000, pp. 21-26). In contrast, Stewart (2011), a professional coach trainer suggests that shorter engagements, which she defines as ranging from three to twelve months are common for business settings while longer, open-ended coaching agreements are more often found in life coaching and other forms of personal coaching. Executive coach Berglas (2002) opines that most coaching engagements do not last longer than six months.

The Goodstone Group, an executive coaching firm, asks its clients to make an initial time commitment to coaching of six months with the understanding that this time frame can be shortened or extended (Goodstone, 2018). Similarly, Fails Management Institute (FMI) (2015), a multi-faceted organization serving the engineering and construction industries states that its executive coaching process typically takes between six and twelve months with one to two sessions per month.

In a survey conducted in 2008, respondents reported that 75% of all coaching engagements last nine months or less with only 5% continuing for a year or more (Council Perspectives, 2008). The American Management Association (2008) also conducted a survey that same year and the results stated that only 18% of coaching engagements lasted over one year. More recently, de Haan et al. (2016) determined that the average length of a business engagement between coach and client is four to six months.

Karl Corbett, Sherpa Coaching's director, has led the administration of their annual coaching surveys for the past decade. I contacted him via email four years ago (2015) inquiring about the length of typical coaching engagements. He emailed back stating that my question could best be answered by saying: 'There is nothing new to report' (Corbett, 2015). In June 2018, I again contacted Corbett because the recent Sherpa annual surveys did not appear to address the topic of the typical duration of coaching engagements. Corbett's emailed response this time was that: 'We no longer ask the question about length of engagement, since answers stopped changing year to year' (Corbett, 2018). He provided the table in figure 2.5 to show the history of Sherpa survey results related to this topic. However, Corbett's interpretation of this data may be open to re-examination. For example, though the '90 days or less category' spiked in 2012 to over a 50% increase from 2007, there was rapid decline by 2014. The belief that coaching engagements should typically take six months or more nearly doubled during the eight-year span displayed whilst the belief that coaching should be open-ended declined to close to 50%. Because this survey is conducted annually, it may have been instructive to know if the respondents' opinions continued to change over the past five years since the question was last posed in 2014.

Figure 2-5 Duration of Coaching Engagements - Sherpa Coaching

Question	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
Coaching engagements should typically:												
a. Begin with a limited scope (90 days or less)					19%	22%	31%	21%	20%	21%	19%	18%
b. Take between 3 and 6 months					39%	41%	37%	36%	44%	43%	42%	40%
c. Take 6 months or more					26%	21%	14%	20%	15%	13%	15%	14%
d. Be open-ended					16%	16%	18%	23%	22%	23%	24%	28%

The Business Success Coach Network (BSCNetwork) stated in 2012 that the length of time for a coaching engagement can vary greatly and offered these overall frameworks: large companies (1,000+) favor agreements of ninety days or less with weekly meetings, mid-sized organizations favor a three to six-month time frame with weekly meetings, and small firms look for meetings every other week inside a six-month time frame (Business Success Coach Network, 2012). I reached out to the BSCNetwork in 2018 to ask if their position had changed. The owner, John McKee (2018) said that over the past five years the trend had indeed shifted and that today the factor most influencing the typical length of coaching engagements is the executive's seniority within the organization rather than the size of the organization. In other words, the organization is the most willing to invest in business coaching for those highest up, sometimes for up to twelve months (McKee, 2018). McKee further commented that in his experience within North America the typical length for a coaching engagement in large companies is approximately four months with weekly meetings, while in contrast the range for mid-size companies has remained at the 2012 figures of meeting twice per month for four to six months (2018).

Though there is not consensus among these sources, the preponderance of results places a typical coaching engagement at between four and six months with the range of opinions for 'typical' spanning from under three months to eighteen months. Figure 2.6 provides a compilation of the discussion and the varying results.

Of course, a question nearly always asked and considered by budget dependent organizations and their human resource departments when first choosing the length of coaching engagements is ‘what is this going to cost?’ This review does not explore fees charged by coaching practitioners because that aspect of the coaching interface is not relevant to the research question. However, one case study that explicitly explores the monetary impact of executive coaching on a single corporation concluded that the ROI for one year of coaching 43 individuals was nearly 700%, totaling over three million dollars (Parker-Wilkins, 2006). These quantitative studies on the monetary ROI of coaching are, however, rare up to this point. One reason for a scarcity of empirical research on the topic may be due to the fact that there is not consensus among coaching academics on how to evaluate a tangible bottom-line against what many view as an intangible activity (coaching) (De Meuse et al., 2009).

Figure 2-6 Comparison of the Duration of Typical Coaching Engagements

Typical Length of Coaching Engagements (Months)

Organization	General	Small	Medium	Large	Individual
AMA (2008)	>12[1]				
BSCNetwork (2012)	4	<6	4-6	4	12
Council Perspectives (2008)	-9				
de Haan, et al., (2016)	4-6				
FMI (2015)					6-12
Goldsmith, Marshall (2014)	6-18				
Goodstone Group (2018)	6				
Grant and Zackon (2004)	6+				
HBR Survey (2009)	>2 to open[2]				
ICF Global Coaching Survey (2012)	4-6[3]				>7
Sherpa Coaching (2014)	<3 to open[4]				
Stewart, Julia (2011)	3-12				

[1] *only 18% over 12 months*

[2] *7-12 months accounted for 45%*

[3] *only 8% more than 12 months*

[4] *3-6 months accounted for 39%*

Long-term coaching defined for this project

The aim when designing this research project was to explore the effects of long-term coaching engagements on the coach's work. As demonstrated in this section, opinions regarding the timeframe for what constitutes a typical coaching engagement are widespread and subject to change over time. Thus, to avoid possible ambiguity, for this project, the threshold for defining long-term coaching exceeds any claims found in the literature for typical coaching engagement durations. I have set this demarcation as coaching an individual or a team for a minimum of two years, either continuously or cumulatively. To be clear, this definition applies only to this research project because, as section 2.7 demonstrates, the term 'long-term coaching' has not yet been defined or codified.

2.7 Long-term coaching engagements – the research and discussion to date

The topic of long-term coaching engagements has been raised a number of times within the last twenty years in both professional and academic literature, though it must be recognized that drawing this topic into discussion does not mean, in most cases, conducting related research or even defining length. In several cases, the topic is mentioned briefly, sometimes without expansion. Thus, presentation of the literature available regarding long-term coaching may read somewhat like a bibliography. Despite this format, I believe that it is instructive to review the input of coaching academics on the subject over the past two decades.

For instance, in their large-scale survey Grant and Zackon (2004) suggested exploring the differences between short-term and long-term coaching engagements as a topic for future research. Perhaps this suggestion comes from the fact that the survey reports that five percent of the respondents worked with a client for longer than two years. Though the percentage is small it is not insignificant, and their recommendation may well be recognizing that long-term coaching engagements is an under researched facet of coaching.

Ten years later, another set of researchers, Fillery-Travis and Cox (2014) note that the majority of research in the field does not mention the conditions in which long-term coaching takes place or the ways in which it is conducted.

In a 2008 journal article de Haan describes working with a client on career development as being an activity that is ‘long-term, whereas there are also minute-to-minute coaching activities which he describes as being ‘very short-term (2008, p. 536). De Haan does not, however, offer specific timeframes to define these terms, perhaps making his observation context specific to the type of help being offered.

In his book published that same year, de Haan suggests that coaching activity is evolving to become a partnership between professionals. He predicts that coaching contracts will, over time, become more long-term, offering an example of a possible structure of ‘five sessions a year over a period of four years’ (2008a, p. 235).

In her thesis on the effects of executive coaching on job-related attitudes, Dingman (2004) puts forth a different perspective. Presenting a comparison for the time expended among different coaching activities she writes that of executive coaching is made up of ‘short-term rigid sessions,’ while mentoring consists of ‘long-term flexible sessions,’ and counseling can be understood as involving ‘long-term rigid sessions.’ (Dingman, 2004, p. 19). Dingman clearly views coaching as being a short-term helping intervention. However, no definition or discussion is given to define the terms ‘short-term’ and ‘long-term’ nor ‘rigid’ and ‘flexible.’ Additional considerations for the differences among coaching, mentoring and counseling are discussed in section 2.3.

Liljenstrand and Nebeker conducted a survey exploring ‘how coaches from different backgrounds approach their craft’ (2008, p. 58) choosing to use academic variables of the coaches as the key factor. Their research concludes that organizations tend to hire coaches originating from a psychology background, while coaches from other backgrounds such as business and education tend to provide more personal coaching services. In their analysis, ‘long-term coaching’ is defined as an engagement lasting between nine and twelve months. Survey respondents reported that between 39% and 45% of their coaching engagements were ‘long-term’ as defined for their study (Liljenstrand & Nebeker, 2008, p. 72).

Exploring the varying typologies in coaching and the changes that have occurred over a fifteen-year period spanning 2001 to 2016, Wellbelove (2016) identifies ‘developmental coaching’ as being focused on medium to long-term development of the client. She notes that experienced coaches are often focused on developmental and transformational spaces with their clients. Though referring to long-term coaching, neither a definition nor an explanation of what that phrase means is provided in the study. Nor is there a discussion detailing what a coach working toward the long-term development of a client does differently from how they conduct their other coaching engagements.

In the report 'Executive Coaching Research' (2013) de Haan et al. characterize coaching engagements that last a year or more and that consist of fifty-plus hours of coaching interaction to be long-term. However, the report does not specify the threshold in time elapsed or hours expended for when an engagement becomes 'long-term,' nor did it specify the possible differences between short-term and long-term coaching (de Haan et al., 2013).

In their systemic review of the literature related to coaching outcome studies, Athanasopoulou and Dopson (2018) state that long-term coaching was found to be more effective than short-term engagements.. The research study that they cited in the review as producing this outcome was conducted by Thach (2002) and was stated by them to be experimental in design (p. 76). Definitions of the terms' short-term' and 'long-term' were not delineated in the report.

In the only study located that directly relates to long-term coaching Meierhoefer (2011), a business coach, researches a possible shift in relational dynamics during long-term coaching engagements for his doctoral project. For his research, Meierhoefer choses to classify the cut-off point for shifting from a short-term to a long-term coaching engagement as being four months and longer. He states that his choice for this timeframe was based on non-empirical evidence derived from internet searches and the opinions of some of his colleagues.

Meierhoefer writes that changes occur when an engagement moves from short-term into long-term. He identifies four attributes that change. First, an in-depth trust between the coach and coachee is necessary not just for the success of the coaching in general, but if the engagement is to progress to a long-term relationship. This change is followed by a shifting dynamic into deeper and more significant conversations. Furthermore, as the relationship continues and the shift into long-term occurs, the coachee naturally moves the focus from business related issues into exploring themselves as a whole person. Finally, with this new perspective and the resulting changes, the organization is impacted by the results of the coaching, as is many of the other facets connected to the coachee's life (p. 130-131). Research design factors such as limiting the range of subject coaches to only include external coaches, interviewing a relatively small number of coaches, and utilizing a somewhat arbitrary timeframe may limit the reach of Meierhoefer's conclusions. However, his work is among the first to formally explore the concept of shifting dynamics for the coachee when a coach and client work together for an extended time.

In her book detailing the evolution of a sample of clients because of executive coaching, Wasylyshyn (2014) presents several case studies related to her experiences and work as an executive coach. She posits that when working with a coaching client long-term (a specific timeframe is not given though each of the case studies in the book spanned several years), if the engagement is successful the coach often shifts from being a coach into forming a different relationship with the executive client, that of being a 'trusted adviser.'

When considering the length of the coaching engagement, each of the above examples center around the length of time a coach and client were in an active relationship with one another. Applying a different filter to the concept of time, the 2013 Ridler Report compares the length of coach/client meetings for internal coaches versus external coaches. The report finds that external coaches tend to have longer meetings (1.5 hours to 2.0 hours) than internal coaches (1.0 hour to 1.5 hours) (Ridler Report and EMCC UK, 2013). At the very least, this report serves as a reminder that the longevity of the coaching relationship can be measured and considered via more than one factor.

Though the literature presented above is sparse, it does provide the beginnings of discussion and exploration into long-term coaching engagements. The literature appears to suggest some correlation between length of time and the depth/breadth of the coaching interaction that contributes to what is still an undefined phrase. A working definition of the phrase 'long-term coaching' as used for this project has been outlined at the end of section 2.6. This description identifies the boundaries of this practice in relation to this research and not in general within the realm of business coaching.

2.8 Summary

Components of the coaching industry that both inform and provide contextual understanding of long-term business coaching engagements have been reviewed in this chapter. Literature related to long-term coaching, however fleeting the mention, has been presented along with references from various sources suggesting a need for more in-depth exploration on this topic. As a coach that has engaged with longevity clients for most of my career, discovering the scarcity of material available regarding long-term coaching provides an increased incentive to conduct this research.

This chapter has examined the definitions and explanations of what coaching is thought to be while acknowledging that there is not agreed standardization regarding these definitions. By inference, this variety highlights the vagueness surrounding the term 'long-term coaching.'

Terminology and titular choices for coaching practitioners has been considered and explained here pointing to the wide range and scope of services that the coaching industry provides. Consideration for what is thought by various sources to be the length of time expended in typical coaching engagements has been presented and discussed. I produced a chart summarizing these findings near the end of section 2.6. This chart newly compares data from a variety of recognized coaching organizations and coaching scholars regarding typical length of engagement. More research is needed on this topic, both for establishing benchmarks and to provide a foundation from which to work toward a definition of what constitutes the meaning of 'long-term coaching' both in scope and duration.

2.9 Aims and objectives

Aims

- To examine the effects of long-term business coaching engagements on the process and approach of the business coach and report the findings to the coaching community.

- To explore if long-term business coaching is a prevalent part of the business coaching sector, which would determine if it is a phenomenon in need of research and further understanding.
- To examine the effects reported by coaching participants and consider how both the process and approach of the business coach might provide a foundation of shared best practices for the industry as well as to point to where additional coaching curricula might be developed or improved specifically for long-term engagements.

<u>Objectives</u>

- Design and conduct a survey.
- Conduct interviews with business coaches who have personal experience with long-term coaching engagements.
- Examine the data collected, assessing and reporting the findings within a dissertation.
- Compile and present the research data for the coaching community in a manner that documents the findings and conclusions.
- Share the results of this research with the coaching community via conference presentations, journal articles (perhaps co-authored in some cases), a white paper, and other avenues of opportunity as they present themselves.
- Apply the findings from this project to my own coaching practice as appropriate..

Chapter 3 – Methodology and Activities

This chapter will provide rationale and explanation for the methodology and research design of this project. I will state my position within the research, present the initial assumptions on which this research has been based and describe how ethical considerations have been addressed within the project. I also present and detail the methods used to conduct the research: preparatory actions, survey design and execution, interview design and execution, participant delineation, data collection and the procedures used for data examination.

When considering the processes and approaches practitioners use to coach, it makes sense to explore the lived experiences of business coaches and their own evolutions (Quora, 2014). It seems that the best way to research the effect that long-term coaching has on the coach's practice is to reach out to those who have experience in this area directly, or as Husserl wrote, to go 'to the things themselves!' (Husserl in Bentz & Shapiro, 1998, p. 96). The aim is to achieve an in-depth understanding of the personal experiences and reflections of business coaching practitioners (Bloomberg & Volpe, 2016; Gray, 2009) who have worked with clients for a lengthy period of time. To accomplish this aim, a mixed methods investigation has been conducted, applying a phenomenological perspective to the mainly qualitative data gathered (see section 3.2). Data collection instruments employed for this research are a survey, interviews, field notes, as well as both formal and informal conversations with industry insiders, all focused on meeting the aims and objectives stated in chapter 2. The resulting data has been examined inductively in order to discover the themes and observations that emerged.

3.1 Research focus

The question specifically and singularly focused on in this research project is:

What is the effect of long-term engagements on the business coach's process and approach?

Explicitly, does the length of the client engagement (long-term versus typical or average; see section 2.6) influence elements of the business coach's own process and/or how they approach their interface with the client? When I initially formed the research question I considered the word *approach* to mean the way in which the coach interacts with the client. Webster's New World College Dictionary (2000) defines the word approach as 'to come near or nearer to; a means of attaining a goal or purpose' (Agnes & Guralnik, 2000, p. 69). I equate this word with the overall manner and philosophy of the coach with a client. Approach might be viewed as the way in which the coach adapts their demeanor to the needs of the client, or in other words, how they move toward, empathize and understand the specific needs of another person in order to carry out their work.. The question I ask is whether this way of being changes when the coach works with that same client over an extended period of time? The approach of the coach with the client could be influenced by a number of factors such as the growth and development of the client, the growth and development of the coach and the coaching relationship itself as it is forged and bonded over time. The word 'approach' in this project applies to changes and shifts in the coach's work and interface with the client.

3.2 Methodology and preparation

<u>Rationale for using a mixed method methodology and a phenomenological approach</u>

After identifying and refining the research question, I needed to decide the methodology that would best address my query. Can the answer be more effectively found in quantifiable or qualitative data? The coaching literature has provided some examples of quantitative studies that have contributed to the foundation of coaching knowledge such as the work of Athanasopoulou & Dopson (2018). The act of coaching, however, is a highly individualistic activity and it follows that each coaching intervention is also unique (Rogers, 2016). I concluded therefore that each coach's experiences and the findings arising from them would also be distinctive. This conclusion poses both a challenge and opportunity for me as the researcher to cast a wide net and devise a mixed-method approach for my research. The intention in my approach is to capture rich data that can later be aggregated into relatable trends or tendencies while also capturing and presenting the specifics of the participants' diversified experiences.

I believe that it is important to gather the thoughts, practices and experiences of as many eligible participants as possible whilst bearing in mind the variety of factors impacting the coach (section 2.4), each coaching dyad and the process of coaching overall. At the same time, I believed that this research would benefit from me as the researcher entering the personal worlds of business coaches to gain an in-depth understanding of their experiences with long-term coaching (Bloomberg & Volpe, 2016). Gray (2009) has stated that qualitative and quantitative methods can be used interdependently, thus allowing for both nuanced insights and measurable data (p. 208). Considering the requirements of this research I have chosen to use a mixed method approach to gather the data for this project using a survey, interviews, field notes and collegial conversations. A mixed methods research design offers various strengths as an instrument of inquiry including providing a pragmatic way of safeguarding so that any inbuilt bias from one method may be mitigated or counterbalanced by the other (Gray, 2009; Johnson et al., 2007). Comparing data from different instruments allows triangulation of the data sets. Also, comparing data from the quantitative (close-ended) and qualitative (open-ended) questions from within the survey provides another triangulation opportunity, thus potentially strengthening the reliability and validity of the survey. Triangulation as a technique produces the possibility of utilizing one method to compensate for the weaknesses or blind spots of the other, while at the same time they may corroborate one another (Gray, 2009; Rossman & Wilson, 1985).

Conversely, mixed method research, as is the case for all research methods, has limitations that must be accounted for by the researcher to create the best opportunity for a valid outcome. Quantitative data from both the survey and the interviews may not be compatible for comparative study due to the differences in, for example, sample size or because the form of data may impact the results given. Further, quantitative data, by its very nature, relies on comparison against pre-existing standard measurements (for example, other surveys and statistical quantities), which may not be available to use as validation for some of the subject matter (Gray, 2009). Also, qualitative data from both instruments (open-ended questions in the survey and interviews), when compared may not be able to be cross-validated due to the complexity of the answers. The survey contains elements of both quantitative and qualitative data gathering, though overall it is qualitative-dominant in its approach (Johnson et al., 2007). Therefore, as I will go on to discuss, I selected a qualitative methodology to work within.

Rationale for a phenomenological approach

Merriam has described and discussed a list of methodologies associated with a qualitative approach to research in her book *Qualitative Research in Practice* (2002). This non-exhaustive list includes the case study, grounded theory, basic interpretive qualitative studies, critical qualitative research, ethnographic study, narrative analysis, postmodern research and phenomenology. Though common qualitative threads run through each approach, they are not the same and none are appropriate for every kind of qualitative research (Merriam, 2002, p. 3-14).Next I consider each of these genres in order to choose among them and identify a qualitative method for conducting this research.

Case study

When conducting a case study, the fact that it is a bounded system must be taken into consideration (Merriam, 2002). In other words, case studies are often used to examine a specific issue in depth to elicit the nuances of what is taking place.

Though this methodology is clearly useful when there is a known phenomenon to explore, in this research I am interested in uncovering; 1) if coaches exist who have the experience of carrying out long-term coaching engagements; and 2) exploring the specifics of practice among coaches with longevity clients if such coaches could be found. Thus, I determined that a case study format would not suit my aim.

Grounded theory

The concept of grounded theory grew out of Glaser and Strauss' seminal work *The Discovery of Grounded Theory* (1967), a publication that arguably raised the status of the qualitative research paradigm (Charmaz, 2006). The goal of this form of research is to derive a substantive theory that is to be found within the data (Merriam, 2002). However, this project is not seeking to create or identify a theory, but instead to answer a question.

Basic interpretive qualitative study

An inductive strategy is used to analyze the data from the study for common themes and recurring patterns in order to create a descriptive outcome (Merriam, 2002). This method can be used to comprehend how participants understand a phenomenon or process. I was drawn to this methodology as it seemed to fit my investigative goal, however, after exploring further I made the decision to use a different methodology, as identified and described in this chapter.

Critical qualitative research

Of course, research does not take place in a vacuum and exists within the matrix of its historical and political conditions. Each coaching engagement also takes place within the coordinates of a specific context and this reality is an element that must be acknowledged by the business coach and their client. Part of the contextual framework of a coaching engagement is the background that each individual brings to the coaching interaction and it is up to the coach to create a space of equality, not supremacy of one over another.

Critical qualitative research questions are framed in terms of conflict, truth and power. Or, in other words, the relational interactions between individuals and how, for example, dominance is distributed: who possesses it, who does not, and who is being oppressed by it (Merriam, 2002; 2009). Whilst this approach certainly piqued the interests of my inner 1960's rebel who believes in parity for all, and I believe such research to be noble and a necessary work for many topics, it is not an approach that fits into the framework of coaching (see section 2.3), or, the focus of this project. Therefore, it is not a suitable methodology within which to explore this question.

Ethnographic study

Research taking the form of an ethnographic study views topics of interest through the lens of society and culture. Study often takes place in the field and this model has long been associated with anthropology. Though there are several subsets of ethnography, the uniting factor is the focus on human societies and their cultures (Merriam, 2002; 2009). The research question for this project does not focus on the culture of coaching, but rather the perspectives and experiences of individual coaches. This project centers around coaches' understanding of their own process and approach with a client, not the culture of the coaching world or of the organization the client works within. Though coaches' experiences could inform the culture of coaching, it is not the aim of this research to focus on producing a socio-cultural work. Accordingly, I concluded that this approach was not an appropriate choice for this project.

Narrative analysis

Data for this type of qualitative research consists of capturing in depth and detailed narrative accounts, or the stories that people tell in order to better understand their meaning.. Hermeneutics, or the interpretation of text to produce understanding is often linked to the process of narrative analysis. Common narrative strategies include biographical and psychological readings as well as the use of analysis or the conversation held between people (Merriam, 2002; 2009). As I am seeking to understand personal experience and specific process, not to pursue and analyze a story with a beginning, middle, and end, I determined that narrative analysis was not a good fit for this work.

Postmodern research

This newer and relatively unused approach (to date) to conducting qualitative research challenges the authority of previous forms of *knowing* and draws on multiple approaches that fractures traditional thinking and format (Merriam, 2002). As discussed earlier, though I am a constructivist, I am naturally drawn to maps, rules, and guidelines, building on and adhering to what others have previously formatted. Given my mentality, this form of inquiry not only does not appeal to me, I also question if I possess the skillsets to do it justice as a new researcher.

Phenomenological research

A phenomenological study is a form of inquiry that focuses on the intricate meanings of an experience which could be called its essences. The experiences of individuals are analyzed and compared to discover the nuances of the phenomenon being studied. During this process, the researcher temporarily sets aside their own personal attitudes and beliefs (brackets herself), allowing them to intuit and see into the core of the experience being studied (Bentz & Shapiro 1998; Gray, 2009; Merriam, 2002; 2009). I recognized immediately that this method fit both my life world and the goals for this research. I understand this approach very well as I use it in my coaching practice every day. As a coach, I am accustomed to *bracketing* (epoche) my thoughts, values, and mores when meeting with a client so that I am free to be fully present for that individual during a session. This skill is essential to my ability to focus on meaning-making, to take a social constructionist approach to my coaching (Harsch-Porter, 2011; Schwandt, 2015). Thus, as has been the case for other practitioner researchers, my position is both emic (inside the experience) and etic (taking the position of an observer) (Meierhoefer, 2011). As a business coach, I have an insider perspective and as a researcher, I rely on the data gathered to answer the research question, bracketing off my personal knowledge as a practitioner.

Phenomenological research does entail the examination and interpretation by the researcher, thus requiring attention and faithful adherence to the data collected and not the opinion of the researcher. Subjectivity related to my views of the interviewees' reflections and the resulting researcher bias could impact delivering succinct and correct interpretation. These cautionary limitations are hopefully mitigated given my own familiarity with bracketing combined with the fact that I interviewed coaches who are also accustomed to examining phenomenon in depth.

Having considered a number of approaches to conducting qualitative research, the genre of a phenomenological approach appears to provide a structure within which both the respondents and I could holistically focus on their experiences, drawing out rich, thick descriptions of their processes and approaches. As a new researcher, I also appreciate that the boundaries for this activity are familiar to me and this is the method I chose for the qualitative aspects of this project.

<u>Rationale to use a survey as a data collection instrument</u>

To attain an answer to the research question, the first point of inquiry is to discover whether business coaches engage in the phenomenon of long-term coaching engagements. This is a critical starting point to ascertain whether there is a sample to work from. Understanding that phenomenological methods (qualitative) are not appropriate for trying to establish the pervasiveness of a behavior (Bentz & Shapiro, 1998) I chose to design an exploratory survey. If business coaches meeting the research criteria (see section 3.3) could be located and agreed to participate in the survey, both data and potential interviewees could be identified. Gray (2009) states that a descriptive survey can measure or identify the characteristics of a particular population and I reasoned that an online survey is an expedient way (Couper, 2000) to locate that population who might then consent to be interviewed, and also, separately, the survey would provide a means to collect profile data and gather personal perceptions via written comments (see section 3.4 for further discussion). Gray (2009) asserts that the validity of a survey is greater when the questions are based on clear and concise research goals whilst reliability in a survey means that the measurement or answers to a question can be replicated by others. This expedition via a survey into long-term coaching engagements covers previously uncharted territory and as such, is exploratory. Provided respondents could be found to collect data from, generalization of the results may not be achievable due to the specificity of the criteria for the population being asked the questions. Validity and reliability will be ascertained by the congruency (or not) of the survey answers, measurement against other types of data collection (interviews) and exploration and comparison of other research which could relate to this population (Merriam, 2002)

The goals for the survey were to:

- Determine if coaches could be found who have experience working in long-term coaching engagements as defined for this project.
- Locate qualified coaches who might consent to be interviewed.
- Collect profile data (demographics).
- Gather opinions, reflections, and personal experiences from business coaches globally. That is, to provide space to invite an in-depth account of coaches' lived experiences in writing.

Surveys can serve as a useful complement to other modes of data collection, such as interviews (Bloomberg & Volpe, 2016; Creswell, 2009; Gray, 2009). They can also provide insight into the extent of an occurrence for a phenomenon being studied (Daymon & Holloway, 2010) and this use addressed my purpose very well. I did understand that in conducting a survey with specific participation criteria, I would 'get what I would get.' Thus, if participants could not be found who met the criteria, I would then need to adjust the research design with guidance from my advisor and consider other data collection methods. If a qualified sample were obtained, then I would move forward to phase two of the planned research which is to conduct interviews with qualified business coaches.

Conversely, it was also possible that results from the survey, particularly due to the inclusion of open-ended questions, could capture a broad ranging plethora of data that could exceed the boundaries of the research question itself. It was appropriate to create an exploratory survey which cast a wide net for capturing data because at the time of implementation, even though I am an experienced practitioner, I did not know what I did not know about the topic of long-term coaching engagements. Thus, it follows that I did not know what I would 'need' to be able to answer the question. The results of this decision are discussed in section 6.1.

<u>Rationale for conducting interviews as a data collection instrument</u>

The purpose of the interviews was to gain a phenomenological understanding, that is, a rich and thick description of coaches' lived experiences (Bentz & Shapiro 1998; Merriam, 2002) of long-term coaching engagements. Gray (2009) and Crotty (1998) both associate a constructivist epistemology (mine) with the theoretical perspective of interpretivism, placing my natural temperament in the qualitative camp. Conducting interviews places emphasis on discovery, on the individual's interpretation as a starting point to comprehend and make sense of situations, that is, to understand how each person constructs their world (Bloomberg & Volpe, 2016; Gray, 2009; Mason, 2006; Merriam, 2002; 2009; Prasad, 2005). Separate from my own preferences, this method suits the need in this research to capture data based on the personal account of business coaches' experiences.

One reason for using interviews as a data collection method is that they can be an effective way of eliciting information that will provide understanding around the meanings that interviewees assign to their own experiences (Mason, 2006; Roulston, 2010). A possibly limiting consideration to this method is that not everyone is articulate or perceptive and may not be skilled at reflection. I did not expect to encounter this issue when interviewing coaches because reflection is supposed to be part of the coach's skillset. However, that expectation must be acknowledged as a bias on my part. Correspondingly, interviewing also requires skill on the part of the researcher in drawing out thoughts and descriptions (Bloomberg & Volpe, 2016). I have been able to re-confirm to myself that my coaching abilities served me well in this endeavor, allowing me to listen with all my senses and to draw out the *question behind the question* (Miller, 2001), thus enhancing the likelihood of obtaining rich data. I concluded that using interviews to gather data also fit well with the key features Bloomberg and Volpe (2016) attribute to qualitative research, 'understanding the processes by which events and actions take place, developing contextual understanding, facilitating interactivity between researcher and participants, adopting an interpretive stance, and, maintaining design flexibility' (pp. 169-170).

3.3 Planned survey and interview sample

Both the surveys and the interviews are intended to provide similar yet distinct types of information about long-term business coaching engagements and the coach's role within them (Gray, 2009; Strauss & Corbin, 1998, p. 39-41). As discussed earlier, when designing the survey during the proposal phase, I did not know whether the desired sample could be obtained but that 'I would get what I would get.' Nevertheless, considering the planned avenues of distribution (see section 3.5) I calculated a possible target number of respondents for the survey. I selected two on-line websites designed specifically to assess expected numbers of respondents for online surveys distributed via email. The formulas for both sites are similar and overall, I projected a possible sample size of 134 survey responses (Creative Research Systems, 2012; Penwarden, 2014). I based this prospective sample size on the input of possible distribution numbers I knew of at the time of acceptance of the proposal. Additional distribution sources are detailed in section 3.5 and results from the survey are presented in chapter 4.

Whilst the availability of the desired sample was unknown, the aim is concerned with exploring what could be known (Gray, 2014) related to the coach's process and approach in a specific type of coaching. This purposeful exploration is intended to generate a sample which will break new ground in understanding the phenomena overall. The breadth of the sample for this project was dependent on two factors: unknown size of the sample of participants and their availability and the unknown range of the distribution of participants and therefore the overall representation could not be predicted. The depth of data related to the survey is largely dependent on the responders' answers to the open-ended questions and of course, how the answers are analyzed by the researcher. The potential breadth of data, whilst answering the research question could potentially lead to inferences which are 'a mile wide and an inch deep,' thus limiting generalizability.

The same considerations apply to the depth and breadth of the data collected from the interviews. Given that there is little previous data to work from on this topic, this project is exploratory in both nature and implementation.

The number of interviews to be conducted depended, in part on the results derived from the survey and in part from determining when the data collected is 'enough.' The literature related to interviewing as a form of data collection often refers to a term credited to Glaser and Strauss (1967); 'data saturation.' They stated that when new interviews stop producing fresh themes and information then the data collected has become 'saturated' and thus the current sample size can be deemed as adequate. More recently, researchers have challenged this conceptual measure of 'enough.' Guest et al. (2006) examined a set of data and applied statistical variables in order to identify an optimal number of interviews for researchers to target. They concluded, more specifically than Glaser and Strauss, that data saturation often occurs within six to twelve interviews. Whereas Francis et al. (2010) conclude that different types of research may require markedly different sample sizes and that monitoring consecutive interviews for new material may be helpful in order to understand when data saturation has been reached. My 'guesstimate' target number for interviews at the beginning of this project was twelve and the results are presented in chapter 5.

This project is primarily qualitative, although some of the survey questions provide a quantitative element. All survey and interview questions are intended to target an expert sample (Etikan et al., 2016) of business coaches who have experience of conducting a long-term coaching engagement. By using a mixed method approach I have been able to triangulate the results (Webb et al., 1966) which I discuss in chapter 6.

To work with a purposive sample, Etikan et al. (2016) state that it is incumbent on the researcher to determine what 'needs to be known' and to find participants who 'are well informed with a phenomenon of interest' and who are willing to share their knowledge and insights (p. 2-3). To locate well-informed participants for the survey, I established a set of criteria for participants' qualifications which are set out in the bullet points that follow. These prerequisites are itemized in the invitation-to-participate, the survey introduction and finally, confirmed via a qualifying question in the survey. After approval of this project by the Middlesex University research Panel, I extended the invitation to take part in the survey to as many potential participants as I was able to make contact with (see section 3.5 for discussion of distribution). The requirements of the coaches in order to participate in this study were to:

- Be engaged in helping their clients achieve business or organizational objectives regardless of the title used by the practitioner to identify their practice (see sections 1.10 and 2.4).
- Have coached at least one client or team for a total of two plus years either continuously or intermittently. Timeframes for the duration of typical coaching engagements are explored in section 2.6.
- Be active as a business coach (see section 2.5) for a minimum of two years. This was an inferred qualification because for a coach to have worked with a client for a minimum of two years, the coach must, by extension have at least two years' coaching experience.
- Be willing and/or able to take a survey online.
- Be fluent in both written and spoken English. Whilst this project seeks to be as inclusive as possible, both the means and time available did not allow for the researcher to accommodate all the added intricacies of working in more than one language.
- Have access to a telephone or online means of holding a two-way international conversation as interviews were not expected to be conducted in person.

<u>Assumptions</u>

As Strauss and Corbin observe, 'we all carry with us certain sets of **recognized** and **unrecognized** assumptions' (emphasis theirs) (1998, p. 70). Such assumptions include statements and beliefs we operate within that are transparent to us. Others become obscured and transparent to us as we take them for granted as being true although we do not have empirical evidence for this. Furthermore, we may not even consciously realize that we hold certain beliefs (Patidar, 2013). Several conscious assumptions were considered and required at the time of preparing the project proposal to be able to design the study. These included the assumption that:

1. A wide enough sample of business coaches currently exists with experience of long-term clients to be able to conduct this study as designed.

2. Such coaches could be identified and located to participate in this research.
3. Survey respondents would self-select appropriately for inclusion.
4. Participants in the survey would answer the questions truthfully and accurately.
5. Business coaches qualified for this study would volunteer to be interviewed.

Discussion and explanation for these five assumptions:

1) Of course, I knew that at least one business coach exists who works long-term with clients – me! Based on anecdotal conversations with other business coaches, I believed that other coaches also had this experience. However, as a researcher, I could not claim to be certain of the veracity of my belief until I collected data to verify it.

2*)* Finding coaches to share their opinions, and to be interviewed about their experiences is not only contingent on the assumption above, but also on being able to successfully identify and secure suitable channels of distribution to make the inquiry. See section 3.5 for how this was accomplished.

3) Concise requirements and qualifications of participants were detailed in the invitation-to-participate in the survey. This step was taken to both encourage and assist respondents to make the correct decision regarding their eligibility for taking the survey. The same criteria were also detailed in the preamble to the survey. Additionally, one survey question was an elimination question, intended to provide a final cross-check of the respondent's profile and suitability for this project (see chapter 4 for further details).

4) It appeared to me to be common sense that persons interested in this research would contribute by answering the survey questions honestly, although as a researcher I had to be alert to the fact that this may not be the case (Simon & Goes, 2013). This assessment about participation is itself a bias. To mitigate such bias, I considered how to bolster respondents' comfort levels, thus perhaps increasing the opportunity for honesty and candidness (Gray, 2009). With that objective in mind, participants were given the assurance of both anonymity and full control to withdraw their comments at any time with no questions asked before deciding whether to proceed with the survey. This assurance was proffered by detailing these points in the survey preamble (See Appendix A).

5) If eligible coaches could be located, the assumption was that some of them would offer to be interviewed as a contribution to this research. This supposition was based, in part, on interest the topic generated when discussing it with colleagues early on. Anecdotally, I have personally found coaches to be giving and helpful by nature and it was my guess and hope that many would agree to assist in this research if they met the qualifications and were given the opportunity to do so.

Boundaries of the research

Boundaries are delineated in research to assist in ensuring the trustworthiness of the final outcome (Bloomberg & Volpe, 2016). Restating the purpose of the project, the aim of this research has been to explore the effect of long-term engagements on the business coach's process and approach. It is designed and intended to address this specific question. To narrow the work to appropriate channels of data exploration and analysis, these topics, populations, and methods are deliberately not included in this project:

- Other typologies of coaching such as life or personal coaching, health and wellness coaching, financial coaching, relationship coaching, parental coaching, mentor coaching, nutritional coaching or assessment coaching. While each of these genres has a potential to produce long-term engagements, and it is possible that these research findings could prove to be relevant to a wide range of coaching types, they are not the remit of this inquiry.
- Input from the client about the process and approach of the business coach they have been working with. This could well be a topic worthy of exploration though not in the purview of this project.
- The advisability of conducting long-term coaching engagements.
- The effectiveness of long-term business coaching engagements.
- An examination of the types of coaching processes. The activity of coaching is quite individualistic, even more so given the many templates and systems of various coach training organizations (Gray, 2006; Grover & Furnham, 2016). While the topic of different models of coaching is thought-provoking, this research question focuses on the impact of the length of the coaching engagement on the coach's process and approach rather than the impact of different styles of coaching on the same factors.

Correlating the type of process or system a coach works within to the length of the business coaching engagement is, perhaps, a topic of interest to future researchers.

The scope of this research is further delimited in these three ways:

1) Participants are required to be coaches who work with clients in and on their businesses or organizations.
2) Coaching engagements must have been conducted for a minimum of two years with an individual or team. Exploration of shorter engagements has not been included in this project, though it is possible that some of these engagements could be deemed to be long-term by other practitioners (Meierhoefer, 2011).
3) Research focus is on the changes in the business coach's processes and approach only, not the client or the organization associated with the client.

3.4 Survey design

To be a "valid and reliable research instrument" (Gray, 2014 p. 150) a survey must measure what it is intended to measure and what it claims to measure. Gray (2014) asserts that there are eight measures of validity to consider in a survey: face, internal, external, criterion, construct, content, predictive and statistical validity (Gray, 2014 p.151). Merriam (2009) does not directly disagree, however, suggests that in qualitative research, categories for validity and reliability should be considered from a philosophical perspective and lists the measures of survey validity in qualitative research as credibility, transferability, dependability and confirmability, substitutes for internal validity, external validity, reliability, and objectivity (Merriam, 2009, p. 211). Another component of confirming the validity of a survey is the triangulation of different data sets as a cross-check of one to the other (Roberts & Priest, 2006).

A measure of reliability in surveys is consistency between measures of a phenomena, meaning that the results can be replicated by other researchers and instruments (Gray, 2014; Merriam, 2009; Roberts & Priest, 2006)). Five ways of testing for reliability include stability, equivalency, internal consistency, inter-judge reliability and intra-judge reliability (Black, 1993 p. 78-79; Gray 2014). Once again, triangulation of data sets can often provide a confirmation of reliability.

Recognizing that all research involves the bias of one's own context and that it is a researcher's duty to recognize and transcend that bias (Bentz & Shapiro, 1998; Gray, 2009), I was mindful of identifying and noting my position in the research. To mitigate this consideration and help provide reliability, I have carefully documented each response to the open-ended survey questions and provided evaluation of the close-ended questions. As partial compensation for my inexperience as a researcher, during the course of designing the survey, several coaching colleagues performed peer reviews on the questions (Gray 2014), my faculty advisor provided guidance, and the Middlesex Panel reviewed the survey before approving it as a part of the proposal.

Rationale for the choice of questions asked in the survey

The choice to utilize a survey for this project began with the primary aim of determining whether a sample of qualified respondents could be located who would consider participating in a one-on-one interview. When considering what should be included in the survey, the aim expanded to include the use of a survey as a means to collect data and perspectives from respondents who might not want to be interviewed but might be open to share their perspectives in writing related to the research question. In keeping with this extended aim, I took a wide-ranging and exploratory approach to designing the survey. Demographic information about the participants including factors such as country of origin were built into the survey. This was done in large measure because since it was unknown if a coaching population even existed that fit the criteria, it was also unknown what factors might be relevant to consider related to process and approach for such a group. Thus, objectives of the survey are to:

- Invite eligible survey respondents to participate in a one-on-one interview.
- Locate business coaches who have experience conducting long-term coaching engagements.
- Collect details of each respondent's reflections and experiences of any shift in their process and/or approach occurring as a result of their coaching engagements progressing over time.
- Document practices, beliefs and attitudes on the topic of long-term coaching engagements related to the coaches' practices.

- Capture the thoughts and reflections of business coaches on the overall topic of coaching clients long-term and the impact that this has on their work.
- Collect profile data for the purpose of possibly finding patterns related to factors involved in long-term coaching engagements.
- Discover if long-term business coaching engagements are an occasional anomaly or a regular occurrence. Plainly, though ancillary to the research question, to answer the unasked question of how relevant this topic is to the business coaching population.

The survey is comprised of twenty-nine questions (see Appendix A for a copy of the survey). The format of the survey includes several modes of questioning: twenty-four closed-ended inquiries utilizing multiple choice, i.e. 'yes/no,' and checklist answers; one multi-faceted five-point Likert scale question with space for comments; three open-ended questions; and one question to ascertain if the respondent was amenable to being interviewed and/or would like to receive a copy of the final results of this project (Renemyi et al., 1998). The close-ended questions address demographic variables such as age, training, country of origin, type of business structure and length of time the participant had been coaching. This latter question has the dual intent of collecting statistical data and qualifying the respondent for inclusion in the project. It asks the respondent to state the longest time that they have coached any one individual or group. Respondents who answered 'under 2 years' were electronically directed to the end of the survey, thanked for their time and offered a copy of the final paper to be distributed after the research project was completed. The three open-ended questions invite commentary and reflection on the respondent's thoughts, experiences, habits, and beliefs related to their own long-term coaching processes and client approach.

The online survey platform I chose to use is SurveyMonkey (2015) which provides a design option to render all responses anonymous. I decided to enact this option in line with the research ethics of this project and my written promise to participants (see section 3.9 for full ethical considerations). The one-page survey introduction detailed the purpose of the research, criteria to qualify for inclusion in the project, definitions of the terms 'long-term business coaching engagement,' 'business coach,' and 'coachee' for this project, participant protections as well as overall instructions for the respondent. The Middlesex University approval panel, my research advisor and an external consultant whose expertise is commercial qualitative research all reviewed the survey questions (Doyle K., 2017). As a final step prior to distributing the survey at large, six seasoned coach colleagues agreed to be critical readers and to pre-test the survey and to provide feedback. This pre-test exercise resulted in the correction of a typographical error (Renemyi et al., 1998).

3.5 Survey distribution

A matter to be resolved was how to distribute the survey to practitioners within the worldwide coaching population, with the objective of providing the best possibility for a broad range of global responses. I approached a number of coaching organizations and asked the directors of their research departments if the organization would consider distributing an invitation-to-participate in the survey to its membership (see Appendix B for sample email requesting distribution assistance).

In total, eight coaching organizations reviewed and vetted the project content to ensure that it met their individual criteria for supporting coaching research. Upon internal approval, each organization then distributed an invitation-to-participate in the survey to its membership via email. The invitation contained an explanation of the project, criteria required for coach participation and an embedded link to the online survey. Organizations that distributed the invitation in this project are:

- Worldwide Association of Business Coaches (WABC) (+/- 1,000 members)
- Library of Professional Coaching (+/- 1,067 subscribers)
- International Coach Federation (ICF) (+/- 30,000 members)
- International Association of Coaching (IAC) (+/- 4,000 members)
- Institute of Coaching (IOC) (+/- 1,800 members)
- European Mentoring and Coaching Council (EMCC) (+/- 6,000 members)
- Conversation Among Masters (CAM) (+/- 600 members)
- Coaches and Mentors of South Africa (COMENSA) (+/- 1,300 members)

The combined outreach of this distribution method based on organization membership was approximately 46,000 individuals. Bearing in mind that an estimated number of all typologies of professional coaches worldwide was 47,500 in 2012 (International Coach Federation, 2012), this distribution could appear to be comprehensive. However, the following factors had to be taken into consideration when studying the possible number of respondents (see section 3.3):

- It has been estimated that upward of 65% of coaches belong to more than one coaching organization (Brennan & Wildflower, 2014, p. 431) thus many coaches potentially received the same invitation several times.
- Membership rosters of each coaching organization include non-coaches (for example, vendors and corporations) for whom the invitation would not be relevant.
- An unknown quantity of each membership base is not fluent in the English language.
- Membership in these organizations include all genre of coaches while the required sample for this research is limited to a sub-set of coaches working within business and professional organizations. The number of coaches in this subset is unknown.

In addition to the mass emails and newsletter announcements provided by coaching organizations, personalized emails were sent by me to coaches I know and/or know of and have contact information for. I did informally ask for 'snowball' participation (asking invitees to pass the invitation on to other coaches) as a further means of recruitment though it is unknown how far that outreach extended (Atkinson & Flint, 2001, p. 1-2).

The organizations listed were provided access to the approved project proposal at approximately the same time. However, each followed its own internal procedures for consideration, vetting, and distribution. The result was that the invitations were sent out to the various membership populations over a period spanning three months. The first requests for participation went out during August 2016 and the survey closed in December 2016. Following Gray's (2014) recommendation, one follow-up email was sent approximately a month after each individual invitation had been sent.

3.6 Survey analysis and coding

<u>The NVivo and SurveyMonkey Software Programs and How I Utilized Them for the Survey</u>

There are various computer software packages designed to assist in the coding of research data which are collectively known as CAQDAS (computer assisted qualitative or quantitative data analysis software) (Bryman & Beardsworth, 2006; Gray, 2014; Merriam, 2009). NVivo is such a program and SurveyMonkey is another. I chose these two programs to work within on the advice of colleagues, my advisor, and my consultant. There are some crossover functions between the programs though NVivo primarily aids in sorting, organizing and managing qualitative content including written, text and multimedia data whilst SurveyMonkey primarily collates and classifies quantitative data.

Survey Analysis Activities

Quantitative survey questions were measured and calculated within SurveyMonkey, thus NVivo was not utilized to code the quantitative portion (close-ended questions) of the survey. In addition to collating data, SurveyMonkey also provides graphing tools which have been utilized to display some of the findings (see chapter 4).

Qualitative questions (numbers four, five, and twenty-nine plus comments allowed within the Likert scale question) were imported from SurveyMonkey into the NVivo program. Working within NVivo, I first read through each of the comments for every question, then carried out an initial sorting of ideas (coding) to preliminarily identify emergent themes (Creswell, 2009; Strauss & Corbin, 1998). To accomplish this task, I lifted words and phrases from the comments, resulting in a long list of descriptors and ideas (depicted in appendix C). This process provided me a sense of the variety of thoughts and observations that came through from survey participants. It also provided a means of identifying concepts in order to begin to understand the qualitative portions of the survey content. When reviewing the initial coding of the open-ended survey questions within NVivo, it was immediately clear to me that this first iteration was a starting point rather than a set of themes.

The tools provided by computer-assisted sorting can be advantageous for an experienced researcher, however, as a new researcher, these tools were unfamiliar to me and in the interests of accuracy, I decided to blend old methods of sorting with the new ones I had been acquiring through working within NVivo. Thus, after creating the first list of concepts in NVivo, I turned to a more familiar tool and loaded the open-ended survey comments into the software program Excel. Using Excel, I was able to examine and sort comments from each open-ended question from a new perspective.

An illustration of the iterations of sorting and coding from the survey is provided in Appendix D applying the data from question 5. This question asks if the coach's process or approach changes in long-term engagements and if so, how. I began by allocating a column to identify each answer with 'Yes' or 'No.' however added two more categories as it became apparent that there were other types of responses to categorize: 'Comment' (CMNT) and 'Void.' The worksheet was then rearranged by these four categories (section 4.6 details the findings) both for ease of identification, and for creating a graph (Figure 4.9).

The next step was to examine the categories. It quickly became evident that there are further topics within the answers, so I added a column and allocated subset observations to capture the breadth of topics. Themes which emerged which are identified and detailed in section 4.6. I examined each open-ended question separately (details in 4.6), re-reading the comments twice. After reading, I set them aside and reflected on what the respondents were saying about their approach and processes along with other topics they chose to comment on. With this framework in place, I went back through the responses a third time, coding anew as I went

As a new researcher, I took to heart the caution about thinking of coding as a mechanistic process, straightforward and unchanging. Rather, I repeatedly went over the words written to capture nuances and subtilties (Schwandt, 2015). Findings derived from the survey are presented and discussed in chapter 4.

Finally, I found it useful to use pencil and paper to ultimately sort and examine some specifics within the survey. In summary, taking these steps to work both with and outside NVivo came about due to a combination of factors: my inexperience in working with electronic coding software which at times felt rigid, greater familiarity with Excel software and nearly six decades of organizing my thoughts by writing them down via pencil and paper.

3.7 Interview participant selection, design and composition

Simultaneous to preparing and disseminating the survey, I also began to identify convenience volunteers who were qualified business coaches I knew or met during the course of this project and who expressed an interest in being interviewed even if they had not had an opportunity to take the survey. I considered this step as a pro-active action to cover the possibility of a poor or non-existent response to the survey. However, response to the survey had the intended and hoped for outcome of establishing a purposive sample to draw from with the objective of conducting interviews (Renemyi et al., 1998). Survey question number twenty-eight asked participants to indicate if they were agreeable to being interviewed and 180 respondents specified that they were. This outcome exceeded both my expectations as the researcher, and the needs of the research project.

Scheduling interviews was the next step (Bloomberg & Volpe, 2016; Gray, 2009; Merriam, 2009). With a large base of possibilities to work from, I was able to draw from this group randomly without regard for gender, country of origin, or any other factors, which could emanate from researcher bias. This list was then reduced to individuals with complete contact information, resulting in forty-three potential participants. Randomness was ensured by scrolling through the positive responses to question twenty-eight and then by choosing every fifth respondent to invite to be interviewed. I then did a second 'pass' through the list, this time starting with the second respondent, again choosing every fifth one. Each was sent a personalized email inviting them to be interviewed for this project (see Appendix D for a sample of the email invitation). As discussed earlier, collegial conversations resulted in several coaches stating that they met the research criteria, and some asked to be able to contribute their long-term coaching experiences to the research. The back and forth correspondence with individuals from these two sources resulted in the participation of twenty-two interviewees.

I conducted all the interviews and, with one exception, I followed the same procedure for each one where we connected at an agreed to time via an online meeting platform FreeConferenceCall.com. In lieu of using a written consent form, I obtained a recorded verbal consent from each interviewee. For everyone, after initial greetings were exchanged, I asked permission to turn on the recorder. When the recorder was switched on, I then formally asked permission again to record our conversation. When permission had been verbally granted and recorded, I read an opening statement to each interviewee before beginning the interview detailing why we were meeting and their rights to withdraw at any time (see Appendix E and section 3.9.1 for a copy of the statement). As previously mentioned, a qualitative consultant silently monitored the first interview (Doyle, 2017) with recorded permission from the interviewee for her presence in order to assess my interviewing skills. Satisfied with my approach and neutrality, the consultant approved me moving forward and conducting the remaining interviews on my own.

The format of the interviews is semi-structured with the objective of providing a forum for each interviewee to reflect on and to have the space to 'tell their story.' I prepared an interviewer guide of ten questions, ready to be used as a prompt if needed (see Appendix E for the interview guide). The intention was to stimulate the interviewee's reflections on their 'lived experience' (Bloomberg & Volpe, 2016; Gray, 2009; Merriam, 2009) and allow them to probe and examine their own inner practices and convictions regarding their long-term clients. I ticked off the questions as we moved along in each interview and took notes to document my impressions regarding tone, speaking cadence and any other factors that I observed during the conversation. At the conclusion of each conversation, I formally turned off the recorder and spoke with each participant off the record for the purpose of answering questions that arose for some, and for the opportunity to informally talk about the project for others. In two instances during those post-interview conversations, the interviewee realized that they had more to say and with permission, I turned the recorder back on to add to the documentation of the interview.

The website software (FreeConferenceCall.com) provided mp3 files which were each downloaded onto my personal computer with one exception. An interview was conducted via email with written questions and answers due to last minute and unexpected technical difficulties with the interviewee's computer and telephone. To discuss and refer to interviewees with proper anonymity throughout this paper, each interviewee was assigned a code (C1 through C22) for purposes of anonymity. I am the only person who knows the identity of each interviewee.

When composing my proposal for this research, I speculated that I might possibly conduct twelve interviews as discussed in section 3.3. However, unique observations were still surfacing after twelve interviews, and I had an ample group of coaches to draw from, so I continued arranging and conducting more interviews. Upon completion of interview number twenty, I believed the data had reached saturation (Glaser & Strauss, 1967; Watling & Lingard, 2012) so I completed the already scheduled remaining two interviews and stopped there.

3.8 Coding and exploration of the interviews using NVivo software and manual notes

Twenty-one recorded conversations, plus one written interview is a lot of data to inspect. To do justice to the data, I understood that I would need to immerse myself in it as fully as possible. To begin the immersion process, I chose to manually transcribe all the mp3 recordings personally, then code the transcripts for emerging themes. I took the following steps to do so:

- Downloaded each of the mp3 recordings onto my personal computer and also into Dropbox (an online storage software).
- Transcribed each conversation into a Word document using an Infinity foot pedal designed for transcribing and a Spectra transcription headset.
- Transcripts were detailed word for word, including pauses, laughter, and other non-verbal communication such as tone of voice or indications of hesitancy.
- When a word or phrase was indecipherable, that fact was noted in the transcript.
- Emailed a copy of the Word document transcription to each interviewee with two exceptions: one individual who stated during the recorded conversation that he did not want to receive it and the individual who was 'interviewed' by answering questions via email, thus not requiring transcription.
- Incorporated corrections into the participant's document as two of the interviewees sent back written clarification of spelling and phraseology after receiving and reading the written transcriptions.
- Placed the mp3 recordings, along with the written transcriptions, in my Dropbox account, stored them on my computer hard drive, and the mp3 recordings also remain housed in my FreeConferenceCall.com account.
- The first 'reading' of the interviews was carried out via the manual transcription from the mp3 recordings into a written document.

- Transcriptions were uploaded into the computer software program, NVivo which, as discussed in section 3.6 designed to assist a researcher with organizing and tracking qualitative data.
- Performed an initial coding of each interview within the NVivo software. I read each transcription line by line, considering what the interviewee was saying and what ideas and points were emerging.
- Initially, I listed topics drawn from the questions asked in the Interview Guide (appendix F) and created a folder for each of those topics (called nodes in NVivo) to begin coding into. I created additional nodes for other topics that I identified as the coding progressed. The resulting list topics are itemized in appendix G. Findings regarding these topics are presented in section 5.3.
- I referred often to my interview notes to match transcript comments to the interview notes, checking for subtleties and nuances.
- All coding from the interviews took place within the NVivo software program. Using this program was more comfortable for the interview transcriptions in part because I had developed a better sense of how to use it. However, for some of the information, such as sorting out the mean number of years of coaching experience for the interviewees, I still chose to use pencil, paper and a calculator to determine the computations.
- After initial coding themes were identified, I approached the data from a new perspective by reading sets of data, five transcripts at a time without coding, just reasoning through what surfaced from them for me. I then returned to each of the five interviews and performed another round of coding, continuing to search for both similarities and differences in what I was reading. I continued this activity for each grouping of interviews until all had been reexamined. Discovering themes was an emergent process of going through multiple rounds of reading and coding, paying close attention to the interviewee's thoughts, comments, reflections, and convictions along with my notes.
- I then examined the contents of each node (theme), reading and considering how each comment related to or explained the theme it was associated with. NVivo properties allow the researcher to easily return to the source of the material to be able

to consider it in context to the overall description as well as to the theme it was coded to. An example of a coded interview is provided in appendix H.

3.9 Ethical considerations explored

'The search for excellence, whatever else it may be, begins with ethics.'

(Solomon R. C., 1997, p. xiii)

The subject of ethics, its meaning and how it governs our world at large has been debated throughout the ages and no doubt will continue to be a central area of deliberation in philosophical discourse. The topic of ethics evokes all manner of debate that can be conflicting, such as debates around the deontological (the end never justifies the means) and the teleological (the end does justify the means) (Gray, 2014). Adding further complexity to the topic, philosophical stances are sometimes eclipsed by context. In the realm of business for example, particularly corporate business, it has been observed that ethical concerns are most often synonymous with *compliance* – the legality of actions rather than the values or moral principles behind those actions (Bucaro 2004). During my fifty years in the world of business, I have often found this stance to be true, notwithstanding the touting of values and mission statements by most organizations.

To be of service to their clients and the organizations they serve, that is, to go beyond mere compliance, business coaches must be able to accurately interpret their client's values and assist them in melding these values with the organizational concepts and principles they work within daily. As Lowman (2013) has observed, industry codes of ethics vary depending on the profession they are addressing. Along these lines, as a coach, I personally resonate most closely with a relativistic view, which considers the mores and specifics of societies and cultures. That is, within each societal framework or culture, I tend to be careful to follow the laws and mores specific to the circumstances I am in, to be 'situationally' compliant. Acknowledging that I have a strong intrinsic sense of my own moral principles, the exception to such compliance would be if I felt it to be violating my personal sense of what constitutes principled conduct and behavior. As it happens, my personal values align well with the coaching industry standards presented by most professional coaching associations. Of course, situations arise for each of us professionally when internal guidance is not enough. The WABC standards, which I have contributed to developing over the years, is my go-to source when seeking clarification on right action professionally (WABC 2013).

3.9.1 Participant protection

Addressing the topic of participant protection, Gibbs et al. (2007) stated it simply and elegantly; 'caring for the researched' (p. 365) They encourage student researchers to develop good judgement toward human conduct, to learn and practice the practical wisdom and sophisticated reflection known to the ancient Greeks as *phronesis* (2007, p. 366). The concept of doing no harm (Brennan & Wildflower, 2014; de Haan, 2008; Gray, 2009; Lowman, 2013) has been my personal guiding principle throughout thirty years of coaching and this same commitment and care has been carried through when working with participants on this project. The *Middlesex Code of Practice for Research* (2011) and the *WABC Code of Business Coaching Ethics and Integrity* (2007) served as my primary guiding instruments when conducting this research. The two documents complement each other well since the WABC code has been written by coaches themselves and the text addresses the importance of integrity in relationships with coaching colleagues, not only coaching clients, whilst the Middlesex code addresses research participant protection which for this project includes coaches.

In the publication *Doing Research in the Real World* (2009) Gray offers four guiding principles for working ethically with participants which I particularly resonate with:

- Avoid harm to research participants in all ways.
- Ensure informed consent of participants - fully disclose all aspects of the research.
- Respect the privacy of the research participants.
- Avoid the use of deception to conduct research (p. 73).

These guiding tenets for research are familiar to me given that they are similar to coaching tenets I abide by as discussed above. They are also guidelines that fit my sense of 'following the rules' as discussed in section 1.5. Adherence to these four principles has been accomplished for this project as follows:

Avoid harm to research participants

Participation in both the survey and one-on-one interviews was completely voluntary and posed no discernable risk to the participants. Contributors self-selected their interest in and appropriateness for participation. I included the name and email address of my Middlesex University advisor in the survey preamble for the purpose of providing reassurance, transparency and facilitating open communication if needed. This inclusion ensured that if participants had questions or concerns, these could be raised with a third party, independent of the researcher (me) (see Appendix A for a copy of the survey preamble).

As previously stated, a qualitative marketing consultant silently monitored the first interview I conducted with the knowledge and permission of the interviewee. This step was a crosscheck to confirm my understanding of facilitating a productive and protective relationship with interviewees. She monitored the interview for neutrality, acceptance and non-judgement in my questions and demeanor and to ensure that I was bracketing my own beliefs and not leading the interviewee. After the consultant affirmed that I had capably demonstrated these skills as an interviewer, I conducted the balance of the interviews without outside observation, though I continued to closely monitor my bracketing stance and neutrality throughout the interviews.

Considering that participants may be interested in, and could possibly benefit from, the results of this work, all survey and interview respondents have been offered a copy of the final document after approval and acceptance of it by Middlesex University (Gray, 2009). I possess a list of interested parties and their contact information for this purpose, garnered from the survey, and additionally, from some email requests. My advisor suggested that reading the full dissertation might be overwhelming for some people, so I intend to create a synopsis of the project after it is finalized and accepted. I will offer either one or both to all interested parties.

Ensure informed consent of the research participants

Informed consent of all parties involved is a central pillar to the ethical foundation of conducting research. Participants should always be able to retain their autonomy by having sufficient information to judge for themselves whether they perceive any risks to a research project. In other words, if they want to become involved and if they do so, whether they want to remain involved (Bloomberg & Volpe, 2016; Gray, 2009). Written consent forms have not been used for this project because most of the research was conducted long-distance. Instead, to adhere to the principle of informed consent for the survey, the preamble clearly outlined the purpose of the research and also stated that the respondent could request that their answers be withdrawn at any time with no questions asked. For each interviewee, recorded verbal agreement to be interviewed was obtained, then I read the following statement to each participant before proceeding:

> *It is anticipated that this interview will take 30 – 45 minutes. If, for any reason, you do not wish to answer a question, or, continue with a subject, please say so and we will move on. If you want to end the interview, I will turn off the recording immediately, or, if you decide, for any reason, that you do not want your answers used as part of the collection of data, none of your answers or comments will be used. If you agree for this interview to be included in the data, your answers will be collated in the aggregate, but will remain anonymous. It is possible that excerpts may be quoted in the final paper, without identifying the person. I will provide you with a written transcript of our conversation today. Do you have any questions or concerns before we begin?* (Appendix E).

<u>Respect the privacy of the research participants</u>

As outlined above, project participants were given a pledge of anonymity in the survey invitation-to-participate, in the survey preamble, and within the opening statement read to each interviewee. This promise was accomplished by selecting the option of anonymous responses in the on-line survey design and by assigning a code number in place of a name for each interviewee. Only I as the compiler knows the identities of the participants or has access to material related to them, with the exception being if I am requested to supply that information to my faculty advisor who must operate under the same terms of confidentiality. Where there is a direct quote from which the interviewee could potentially be identified within this document, I sent the corresponding section to the participant involved to confirm their comfort level with the comments presented (Bloomberg & Volpe, 2016).

All data related to participants, including surveys, interview mp3s, transcriptions, corresponding emails, and notes will be retained by me for five years after the completion of the project in compliance with the *Middlesex Code of Practice for Research* (2011). At the end of that period of time, all material, other than the completed project paper will be deleted, shredded, or otherwise destroyed, further respecting the privacy of the participants.

Avoid the use of deception to conduct research

The research question and its purpose were described to all potential research participants fully and accurately in writing, allowing each the opportunity to decide if the topic was of interest to them and if they wished to contribute to the project.

It has been incumbent on me as the compiler and analyzer to authentically report conversations, written opinions, and correspondence without editing or manipulating either the data or the intent of the respondent. I acknowledge and fully agree that as the investigator, I had and have multi-faceted responsibilities to do my best to guard against inserting my own bias into my reporting or to misrepresent any data. This responsibility to do my best to guard against inserting my own bias into my reporting or to misrepresent any data extends to the participants, to the way in which the research is conducted and to the outcomes of my research.

3.9.2 Data protection

Separate from the philosophy of ethics, and a researcher's individual beliefs about the topic, every researcher is required to be aware of the laws and regulations governing their realm of research (Merriam, 2002; Resnik, 2015). As an example of maintaining vigilance in this area, I became aware that as of May 25, 2018, a new law came into effect that encompasses all transactions with any person or company within the European Union (EU), regardless of the country a transaction originates from. This law, the General Data Protection Regulation (GDPR), refines a set of laws that had already been in place concerning personal information. Although I reside in the United States, I am enrolled at Middlesex University, which is located within the EU (at the time of this writing), and, I have surveyed and interviewed individuals living in countries within the EU. Thus, my research is subject to this law (European Commission, 2018; Tsunami, 2018).

Being aware of this fact, I consulted the *Middlesex DPS 4561 Handbook* (Costley et al., 2013) and re-read the REF form submitted with my proposal for this project to determine if additional steps needed to be taken by me to fulfill GDPR requirements. My conclusion was that the university requirements for the protection of research participants and their personal data exceeds the boundaries of the new law. That is, Middlesex University requires its researchers to ensure the 'inclusion of data protection from the onset' (Trunomi, 2018).

Therefore, adhering to compliance with the *Middlesex Code of Practice for Research* (2011) safeguards both the people and data involved in this project, while at the same time, ensures legal conformity.

Throughout this project, cautionary measures have been taken to protect all information and material related to it. At the beginning, I conducted my work via a desktop computer in my home office. It was backed up monthly on to one of two external hard drives which I then stored in a safety deposit box at my bank, which I rotated out each month. I currently use a laptop computer which is also backed-up to a hard drive monthly and stored in my safety deposit box. Moreover, I place key documents on USB thumb drives, which are stored in two different buildings. Specific to this research project, these precautions cover three areas; written work, downloaded articles and vital communications with my advisor and others including emailed permissions to quote certain text. As an additional precaution, written project work is also stored in 'the cloud' in Dropbox.

At the end of this project, all data in my possession will be stored in my bank safety deposit box for the five years stipulated by Middlesex University (2011). This will include all handwritten notes, printed communications and electronic information which will be copied to a dedicated USB drive, then deleted both from my computer and Dropbox. At the end of the five-year period, all data in the bank safety deposit box will be shredded or otherwise destroyed.

3.9.3 Ethical research and reporting summary

I have striven to be meticulous in reporting all that I have collected exactly as stated, without change or embellishment as the collector and interpreter of this data. Credibility is another core ethical principle in research and one aspect of proving this to the reader is the degree to which they can be assured of the veracity of descriptions included and themes identified in this dissertation (Bloomberg & Volpe, 2016). All data presented has been duly attributed to each participant involved in the interviews, the survey, and any conversations with colleagues relevant in this paper. All interpretation and conclusions regarding that data are my own thoughts and unless otherwise explicitly stated as such, are not to be attributed to any participant, colleague, my advisors or Middlesex University.

3.10 Summary

In chapter 2, it was demonstrated that there is sparse research yielding theory and underpinning principles from which to build upon for this specific project. Thus, this pioneering exploration will hopefully open new topics for research and it is expected that the results will provide support for industry associations and other governing and training bodies to use when refreshing recommended core competencies and when updating guidance on coaching ethics. Their guidance materials and the credentials emanating from them could be integrated into training and education offered to coaches, both novice and seasoned globally. At the very least, an understanding of the length of coaching engagements and the effects of long-term engagements on the work and process of the business coach has begun to form.

Data from both the survey and the interviews have been studied and analyzed with an explorative mindset and contains the participants' account of their memories and/or current situations of their own lived experiences (Strauss & Corbin, 1998) throughout the tenure of their practice. Examination of the data generated by this research has been inductive utilizing a phenomenological analysis strategy of searching for themes emerging from the data and triangulating the quantitative and qualitative elements of the data when it has been possible to do so. A rich array of approaches, process evolution, successes, failures, and learnings has emerged which will be presented and discussed in chapters 4 and 5 and brought together in chapter 6.

Chapter 4 Survey Findings and Data Discussion

4.1 Survey: overview of findings

This chapter presents the findings emerging from the survey data along with discussion of these results. These relate to the question explored in the framework of phenomenology that this study addresses: *What is the effect of long-term coaching engagements on the business coach's process and approach?* The order in which this chapter outlines the survey outcomes begins with the closed-ended questions, moves on to the Likert scale question and lastly examines the open-ended questions. (See Appendix A for a copy of the survey).

Survey Respondent Profile
(204 total possible respondents)

Most of survey respondents were:

**** female (64.3%)***
**** average age range: 55-64 (42.5%)***
**** born in the United States (43.7%).***
**** practicing between 6-20 years (76%)***
**** external coach (87.3%)***
**** fulltime coach (55.3%).***
**** coaching certifications-(83.1%)***
**** Masters or Doctoral Degree-(65.5%)***
**** client engagements 2-5 yrs (63.2%)***
**** meet with clients in person (55%)***
**** offer services plus coaching-(59.9%)***

4.2 Findings from the survey respondent demographics

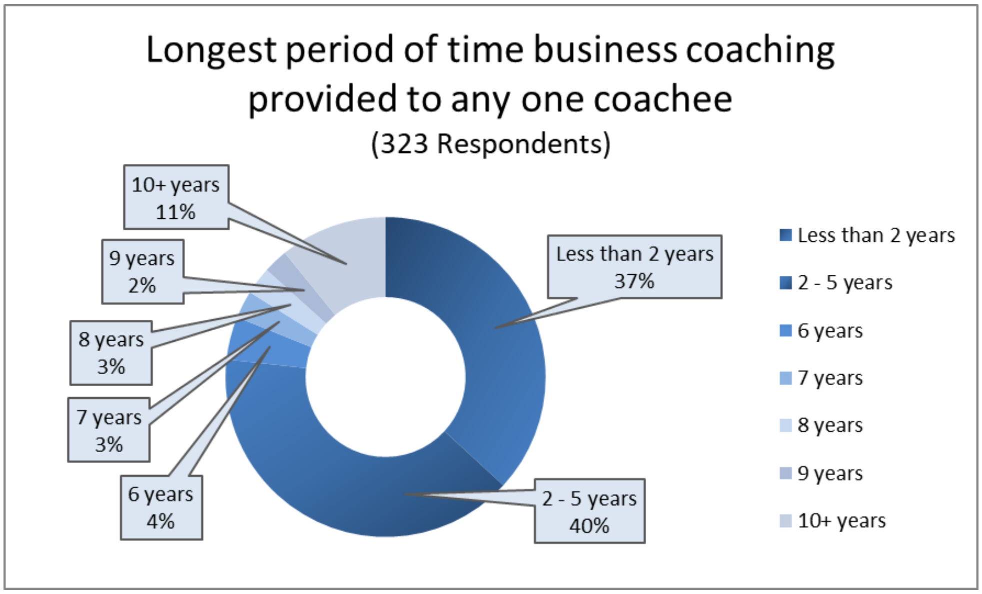
The survey consists of twenty-nine questions answered by a total number of 325 respondents. Most respondents skipped various questions throughout the survey. Therefore, percentages shown are related to the number of respondents to a particular question, not to the number of survey respondents as a whole. As discussed in chapter 3, the survey findings were compiled using a combination of SurveyMonkey tools, the NVivo software, Excel software and manual exploration via pencil and paper. The close-ended questions were collated and reported in this chapter primarily using the SurveyMonkey program though some of the illustrations offered in this chapter were created in other electronic software including Excel because I felt that clarity of the graphs within SurveyMonkey was not sufficient. The open-ended questions were examined and coded mostly within the Excel software program as has been discussed in section 3.6.

The breadth of the coaching experience of respondents (305 replies), range from less than one year to more than forty-one years. Thirty-two respondents among this group (10.5%) indicated that they have practiced as a coach for less than two years, the threshold for contribution to this project, whilst twenty-one of the respondents (6.9%) have been coaching for over twenty years.

Question number two asks how long the respondent has coached any one individual or group for a query yielding 323 replies. Among these replies, a total of 119 individuals answered that the longest they had coached any one client was ‘less than two years,’ thus not meeting the qualifying criteria for this project. This group of respondents (36.8%) was electronically directed to the end of the survey where they were offered a copy of the results and thanked for their time and interest. It was initially startling to me that over a third of those agreeing to participate in the survey did not fit the profile for this project. As described in section 3.3, the criteria for participation had been stated clearly both in the invitation-to-participate and the introduction to the survey (see Appendix B for a sample invitation-to-participate and Appendix A to view the survey introduction).

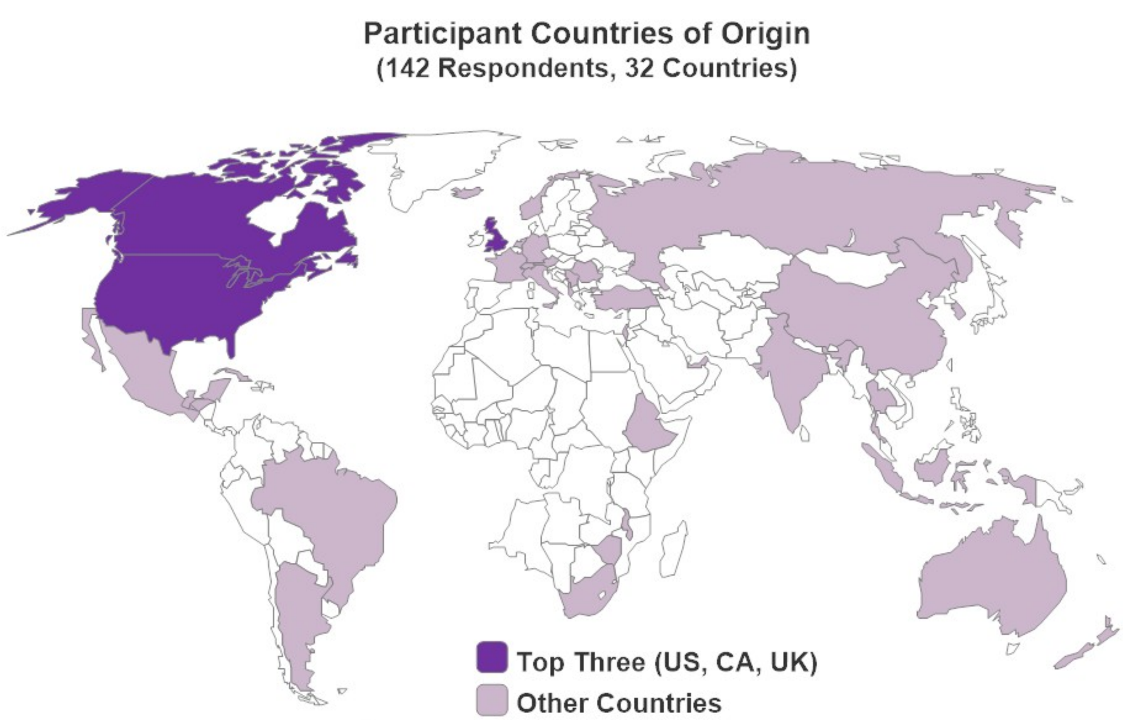
204 respondents (63.1%) answer question two saying that they have personally experienced the phenomena of having a long-term business coaching engagement, ranging from two to ten-plus years with a mean of about five years (see Figure 4.1). These 204 coaches are the participants who had the opportunity to take the survey in full (though as noted, respondents skipped various questions). Thus, with the exception of the first two questions (years of experience as a business coach and length of time coaching any one client), all of the statistics presented in this study emanate from these 204 business coaches who have experience in conducting at least one long-term coaching engagement.

Figure 4-1 Length of coaching engagements



Respondents originated from thirty-two countries (142 answers) with the majority coming from the United States (43.7%), Canada (12%) and the United Kingdom (9.9%) (Figure 4.2). This group of coaches report collectively to have experience with coaching in over forty countries.

Figure 4-2Participants' country of origin



The respondents (140) identify as being 64.3% female and 35.7% male.

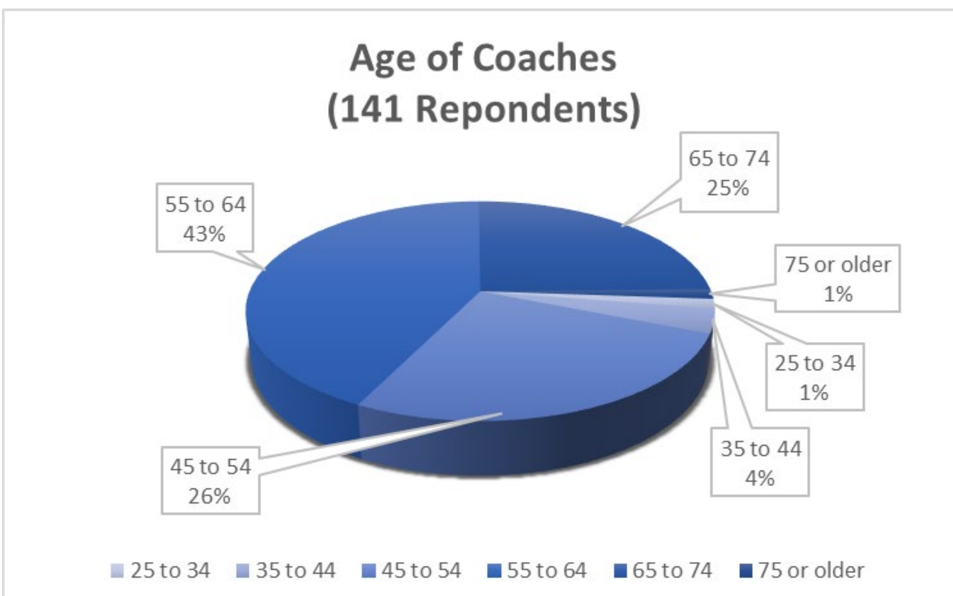
A strong majority of the survey participants, 86.9%, report that they are external coaches, 8.9% as internal coaches, and 4.1% list themselves as manager-coaches. A majority of the respondents, 56.2%, say that they are working as fulltime coaches.

Formal academic education ranged from high-school completion (2.8%) to varying and sometimes plural postgraduate degrees (65.5%).

Most respondents, over 83 percent (83.1% of 142), have earned one or more coach specific qualifications whilst 88% (of 142 respondents) have a membership in one or more associations or professional organizations related to coaching.

Participant ages ranged from twenty-five to seventy-five-plus years as Figure 4.3 demonstrates:

Figure 4-3 Age of survey respondents



4.2.1 Discussion of survey demographics findings

Forty-five percent (44.9%) of the 305 people responding to question one state that they have ten or more years of coaching experience, whilst 10.5% report having two years or less experience. These numbers could imply a growing level of coaching tenure, whilst at the same time acknowledging new talent entering the field.

Other coaching surveys asking about practitioner experience have varying results. ICF's most recent survey (International Coach Federation, 2016) reports that only 25% of its respondents have ten or more years coaching experience. In contrast, the most recent Sherpa Executive Coaching Survey (2019) reports that 65% of its respondents have been coaching for ten years or more.

The disparity in percentages is striking, and the reasons for this range from 25% to 65% are not readily apparent. One consideration, as discussed in section 2.2, is that surveys are often not comparable due to inconsistencies of the specific question asked, the respondent profile stipulated, and the range of the survey distribution. The survey in this research targeted a distinct segment of the coaching population (experience with long-term coaching) unlike the ICF and Sherpa surveys which were open to all coaches who wished to participate. Because of the required criteria it can reasonably be assumed that the participant population for this research would include a higher percentage of more experienced coaches.

This possible assumption noted, the Sherpa survey results for coaches exceeding ten years' experience are about one third higher than even this targeted survey (45% versus 65% for the Sherpa survey). However, filtering the data to exclude those who began to take the survey, but who did not meet the base criteria (119 participants), the percentage of participant coaches with ten years plus experience rose from 44.9% up to 61.2%, more closely paralleling the Sherpa results. I contacted Karl Corbett, the managing partner for Sherpa Coaching via email and requested his opinion on this matter. He replied 'Please keep in mind that the Sherpa survey is run annually, every year since 2005. Other surveys are intermittent, and their invitation list might well change from one iteration to the next. Our survey would be likely to attract repeat responses from folks who have been in the business longer' (Corbett, 2019). The data may support Corbett's theory of Sherpa reaching a more experienced coaching base due to the consistent annual outreach..

There is yet another consideration regarding these statistics. As a result of communicating with Corbett, Sherpa's Research Director, Joe Valeri, contacted me separately with this observation; 'You have identified a disparity in coaches' tenure when comparing the 2019 Sherpa survey with a 2016 ICF survey. It is possible that the ICF data is even older than the publication date. Perhaps a more valuable comparison would be to the 2016 Sherpa survey, which reported about 51% (as opposed to 65% reported in 2019) with tenure greater than 10 years' (Valeri, 2019).

Exploring another survey, this one commissioned by the European Mentoring and Coaching Council (EMCC) (Passmore, et al., 2017), 38.5% of the respondents report having eight or more years coaching experience. At the other end of the spectrum, 36.6% of the respondents report three years or less coaching experience. These four surveys are good examples of data that may not be able to be directly compared and thus may not be generalizable. Points to consider when attempting comparison of coaching surveys in the literature include:

1) The time frames stipulated among various survey questions are often not exact matches so true comparison may not be possible.

2) Criteria for inclusion varies among coaching surveys. For example, the EMCC survey (2017) was restricted to coaches within Europe while the ICF (2016) and Sherpa (2019) surveys were open to all coaches. This project survey was restricted to participants with experience conducting long-term coaching engagements. All these factors limit assessing the data in an exacting and comparative manner.

3) The variation of languages that surveys are available in may also limit comparison of the results from survey to survey. This project was restricted to the English language as are the Sherpa surveys (2019). On the other hand, the ICF survey (2016) was distributed in nine languages and the EMCC survey (2017) in thirty-one languages. This fact alone tells us that coaching is a worldwide activity conducted in many languages. Thus, input limited from otherwise eligible coaches due to a language barrier may be a factor preventing comparison.

4) The sponsoring organization(s) for survey research may have a natural though unintended influence on which coaches choose to participate. For example, the EMCC survey (2017) counted among its sponsors the Henley Centre for Coaching, which, among other pursuits, is

a coach training center, and thus this survey might have attracted a preponderance of newer coaches.

<u>Eligible Respondents</u>

The fact that over one third of those choosing to participate in this project survey (36.8%) do not match the profile for participation is disappointing and at the same time, enlightening. This outcome highlights a drawback of volunteer sampling, which is the inability of the researcher to control participation self-selection. Couper (2000), an expert on web surveys asserts that to minimize respondent error, the survey instrument must be easy to understand' (p. 475). Heeding Couper's caution, care has been taken so that both the subject matter of the study and the criteria for inclusion were communicated in writing; both in the invitation-to-participate, and also within the survey instructions. It is open to interpretation as to whether these communications were 'easy to understand,' or needed further clarification. However, a Middlesex university advisor, an outside consultant who owns a business conducting qualitative research, the proposal approval committee for Middlesex University, and six coaching colleagues reviewed and vetted the survey including the instructions and criteria. Yet, it must be noted again that despite these steps, many coaches chose to begin the survey even though they did not meet the sought-after profile.

Another unexpected outcome for me as a new researcher was the fact that none of the twenty-nine questions were answered by all responders. While I do not know for certain the reasons leading to this result, I do know that I need to adjust how I assess and report percentages regarding data so as to measure against the number of individuals who actually answered each question to accurately evaluate and integrate the data (Gray, 2009). These situations were excellent lessons for me, and I have experienced clearly how attention to detail and working with experienced researchers (such as my advisors) is important to ensure the integrity of the data.

Continuing to assess the data, it was gratifying (being perfectly candid) to discover that nearly two thirds (63.1%) of the respondents *did* have experience with coaching an individual or team for two years or longer. As discussed in section 3.3 one of the assumptions put forward for this project is that coaches could be found who had such experience and it is satisfying to discover that the assumption is correct.

Qualified coaches from thirty-two countries contributed to the survey. I attribute this broad level of participation to the generous support of the several coaching organizations globally that agreed to distribute an invitation-to-participate (see section 3.5 for the list of distributing organizations), thus providing a broader appeal than I believe I could have created alone. Although a broad geographical range is represented overall, nearly two thirds of the participants (64.1%) come from three countries, the United States, Canada, and the United Kingdom.

There may be at least two reasons for the preponderance of responses favoring these three countries. First, one of the requirements for the survey is that respondents are fluent in English and these three countries are predominantly English speaking. Second, though coaching is a worldwide industry today, it was pioneered into its current form (which is ever evolving) via paths forged by the human potential movements developed in the United States and the United Kingdom. Coaching luminaries such as Sir John Whitmore, Thomas Leonard, Laura Whitworth, and Tim Gallwey to name but a few, all originated from and honed their coaching stances in the U.S. and the UK (Brock, 2012; Wildflower, 2013), working actively to build and promote the industry. Indeed, the recent survey conducted by ICF (2016) states that the majority of coach practitioners (60.8%) are from North America and Western Europe. Accordingly, it is reasonable to extrapolate that these areas have more eligible coach practitioners to draw from, once again, paralleling proportions already established in the literature.

There may be a bias hidden within these numbers that should be noted. With over half of all respondents coming from North America, these survey findings may not be a true representation of the global coaching population, both in practice and custom. Thus, caution should be observed when applying the results of this research to all countries and cultures.

An overwhelming majority of those who responded (83.1% of 144) hold membership in at least one professional coaching association. The 2017 EMCC survey (Passmore et al., 2017) in contrast, reported that only 69.2% of 3,350 respondents held such membership. These differing results could be attributed to a number of factors, for example, sample sizes were quite different, criteria for inclusion in each survey was different, and perhaps cultural attitudes toward joining professional organizations vary throughout the world. The latter would be especially difficult to compare because this project survey was open to coaching practitioners worldwide, including Europe, whilst the EMCC survey was open only to European practitioners. Further inquiry into the data could be interesting however though notable, the topic of membership in coaching associations is not the focus of this project. These statistics may be of interest to coaching associations as this survey indicates that over four out of five practitioners with long-term coaching experience also hold memberships in professional coaching organizations.

Sixty-four percent of survey participants identified as female (ninety) and 35.7% as male (fifty). These numbers align with Liljenstrand and Nebeker's coaching survey (2008), which reports that its respondents are 67% female and 33% male. The results are also similar to ICF's most recent survey (2016), which report 67% of its respondents as women. Finally, the results trend with EMCC's 2017 survey (Passmore et al., 2017) showing that 61.1% of the respondents were women.

A small number of this survey's respondents (4.14% - six individuals) identify themselves as manager-coaches and another six respondents (4.14%) list themselves as being 'all of the above.' That is, they view their coaching duties as spanning the range of being a manager-coach, an internal coach, and also working with clients externally, outside the company. These results are distinctly different from the 2016 ICF survey which listed 17% of its respondents as 'managers/leaders using coaching skills,' grouping the remaining 83% to include external, internal, and 'all of the above.' (International Coach Federation, 2016).

These varying results may be due once again to a difference in inclusion criteria for the surveys. The ICF survey was open to all coaches while this research project survey stipulates that a coach must have worked with an individual or team for at least two years and it is possible that not as many manager-coaches have had that experience and were thus either electronically excluded or self-selected not to participate. In the most recent Sherpa survey (2019), 95% of respondents describe themselves as being external coaches, again generally in range with the results in this project survey in which 86.9% of the respondents reported as being external coaches. The comparisons are interesting; however, it is unknown if these surveys can be compared quantifiably.

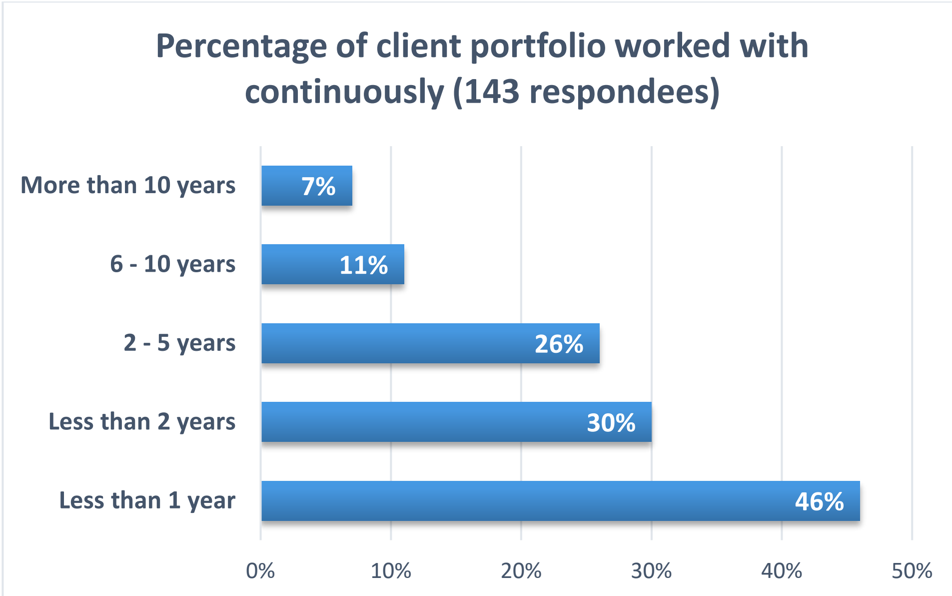
Among the 144 respondents answering the question about age 5.56% (eight participants) were age forty-four or younger. Within that group of eight coaches, six were external (75%), one was 'all of the above' (internal, external, manager as coach - 12.5%) and one was 'manager as coach' (12.5%). In contrast, the ICF survey (2016) report that 45% of the ICF manager-coach respondents were age forty-four or younger while 29% of the external coach practitioners fit that age group. The ICF report (2016) specifically notes that the number of manager-coaches who responded to their survey skewed toward the younger age groups. The Sherpa report (2019) does not find as much variance in ages between internal and external coaches but did observe that internal coaches were 'more likely to be rookies' (p.64). Those results are not replicated in this project survey. Of the six individuals who identified as 'manager as coach,' only one was under the age of forty-five.

Though the quantity of the participants may not allow for generalization, it is reasonable (in consideration of the ICF survey results which concludes that that older, more experienced coaches are more likely to have longer engagements), to assume that this is the reason for more mature participant age ranges in this survey. Further, as the concept and use of coaching skills is expanding within organizations it is possible that up-and-coming younger leaders may be adding coaching skills to their competencies as a step in the preparation for future promotion, thus possibly accounting for the higher percentages of manager-coaches in the ICF survey. This possibility is supported by the Sherpa report (2019) which notes that once internal coaches have gained coaching experience, many of them transition to becoming external coaches. Of significance here is the amount of data being sought and accumulated worldwide by coaching surveys, all of which has the potential to provide a foundation for future statistical (quantitative) comparative analysis of aspects of the coaching industry. For that comparison to be possible, standardization of questions and criteria by cooperating coaching researchers would be very helpful.

4.3 Findings related to the coaches' businesses

Whilst each of the survey participants had worked with one or more clients long-term, 143 respondents report that the majority of their current portfolios (76%) consisted of clients they had been working with for less than two years (Figure 4.4).

Figure 4-4 Makeup of respondents' current client portfolios



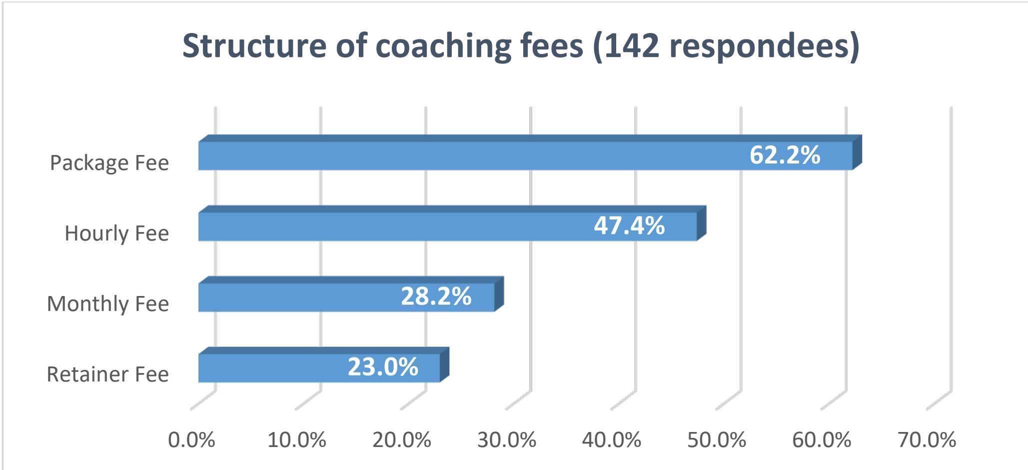
For these coaches, meetings held with longevity clients ranged in frequency from semi-weekly (4.2%) to 'as requested or needed.' Nearly three quarters (74.1%) of the respondents reported meeting with their longevity clients bi-weekly or monthly. Illustrative comments from the 'other' category for this question include:

'Too flexible to categorize.'
'Everyone is different. Some are 'on call' and others are monthly or as-needed-even-less-frequently.'

Fifty-five percent of the survey respondents (142) deliver their coaching services in person, with the remainder of delivery comprising telephone, Skype, email, text, and other electronic means of communication. Three quarters of 142 respondents (76%) indicated that their practice includes providing coaching services to both individuals and teams. Individual-only coaching was offered by 22.6% of the respondents and 1.4% offer team-only coaching services.

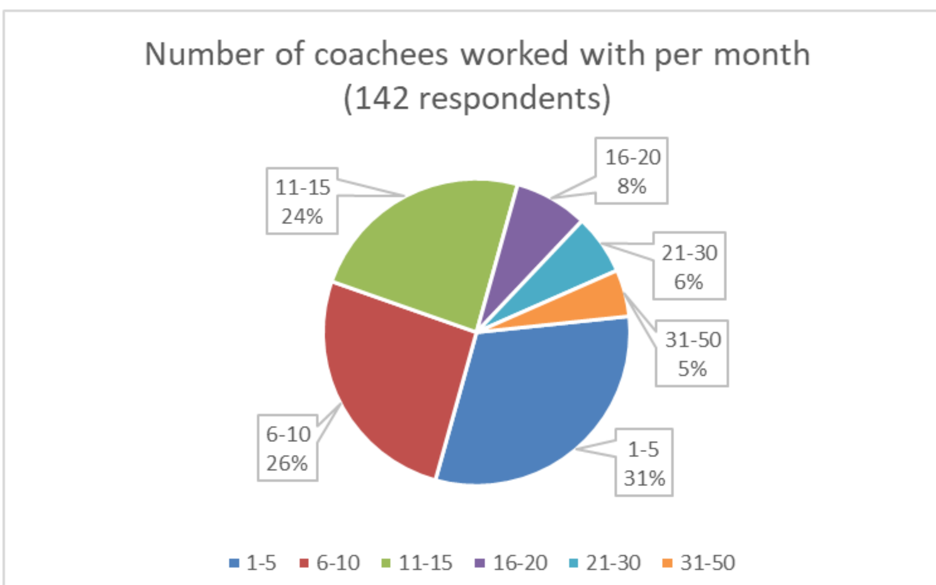
Respondents offer a variety of means to accept remuneration from all their clients, though the most common method reported (61.6%) is the use of package fees. Among the 133 coaches who answered this question, most offered multiple means to charge their clients as displayed in Figure 4.5.

Figure 4-5 Business coaching fees



In addition to coaching services, nearly sixty percent (59.9%) of 142 responders answer that they or their company provide 'other' services to clients. These services span a broad list, including supervision, ministry, accounting, legal services, life coaching, consulting, and mentoring. Over half of the coaches (57%) work with ten or less individual clients in per month though they may see the same client several times within that month (Figure 4.6)

Figure 4-6 Number of clients served each month



4.3.1 Discussion of findings related to the coaches' business

Respondents (142) report that 55% of their coaching services are delivered in person with the remainder of meetings encompassing telephone, Skype, email, text and other electronic means of communication. A 2009 survey (Coutu & Kauffmann, 2009) reports that 75% of those respondents' coaching meetings took place face-to-face with only 25% conducted via telephone or email. More recently, a coaching survey (Sherpa, 2018) reports the percentage of in-person coaching meetings to be 35%, whilst Sherpa's 2019 survey lists in-person meetings at 32%. This annual survey has asked this same survey question for twelve years; the highest percentage of in-person meetings reported was in 2008, 2009, and 2011, all at 46% and they have been steadily declining since then (Sherpa Coaching, LLC, 2018; 2019). The differences in face-to-face meeting percentages are significant enough to warrant future exploration though once again, are perhaps not statistically comparable. In the survey for this project, 142 coaches answer the question about delivery and technology, while 140 answered the Contu and Kauffman survey (2009). The Sherpa survey had approximately 700 respondents, equating to about five times the number of answers (though it is unknown how many of the Sherpa respondents answered that question).

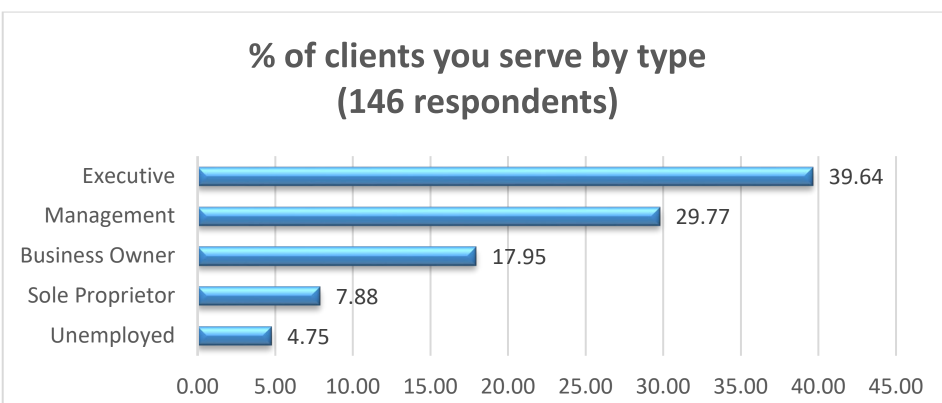
A factor to consider when evaluating the higher percentage of face to face meetings in the survey conducted by Contu and Kauffman (2009) is that this data gathering took place a decade ago. Both the ease of technology and working familiarity of users has grown immeasurably since then and perhaps this has resulted in less in-person meetings. As discussed, the criteria for participation in this project survey targeted a specific subset of coaches. The 2009 survey (Coutu & Kauffmann, 2009) targeted all executive coaches and the Sherpa survey (2019) was open to all coaches. Like the discussion on participants ages above, it is possible that the sub-set of the coaching population segmented out for this project survey conducts their coaching differently. Whether this is because the coach's style may have been forged before the advent of pervasive technology, unique relationship factors in longevity engagements or other considerations, over half of these respondents still conduct their meetings in person. This topic could be the subject of further research.

The statistic that nearly half (44%) of answering respondents' collective portfolios currently contain longevity clients gives rise to a question regarding the process and approach of the individual coach. One might speculate whether some coaches exude a demeanor or utilize a style that is more conducive to clients who are inclined toward longer engagements. This concept fits with Clutterbuck and Megginson's (2011) theory of varying levels of demonstrated coaching competence and maturity and with Peterson's (2011) observation that the coach's ability may affect the coachability of the client. Perhaps the practice of these coaches takes place in areas of business, or at a level of hierarchy within the organizational chart which may be disposed toward and/or in need of longer engagements. Another possibility is that this group of coaches works more often with individuals who have the power to authorize the continuation of coaching engagements, including the budgetary control necessary to pay for them. This concept is supported by the reported statistic that nearly two-thirds (65.5% of 146 answers) of the respondents' clients were executives, business owners, or sole proprietors, all positions with potential high levels of time-allocation control and monetary authorization. Combining comparable categories from the 2016 ICF survey (International Coach Federation, 2016) (executives, business owners, entrepreneurs, personal clients), 65.4% of participants' clients had similar levels of authority, closely paralleling this research project survey (p. 15).

4.4 Findings related to clients served by the respondents

Respondents report the gender composition of their client portfolios over the past two years as 46% female and 54% male. The spectrum of 'client-type' served by survey respondents is displayed in Figure 4.7.

Figure 4-7 Type of client served by respondents



Less than a third (31.7%) of the coachees that the group of 143 respondents work with pay the fees for their business coaching with personal funds. The balance of payments for coaching services is provided by the organization the coachee is working in (or the organization owned by the coachee). The category or type of organization associated with the coachees of survey respondents is reported as about 80% for-profit and 20% non-profit enterprises.

4.4.1 Discussion related to clients served by the coaches

Respondents report that their client portfolios are 54% male and 46% female. Interestingly, gender proportions within these coaches' portfolios were almost exactly opposite to the results reported in the 2016 ICF survey: 54% female and 46% male (p. 17). A possibility could be that the project survey respondents may work with higher-level executives who occupy what are still known to be male dominated positions (Powell, 2019) within the business world. However, there is not sufficient information within these surveys to confirm or deny that speculation.

Respondents report that 39.6% of their clients are executives, 25.8% are business owners and sole proprietors and 29.8% are in management. The balance comprised clients who are unemployed. These statistics are not completely comparable to those in the ICF (2016) survey due to the differing terminology used in the surveys. For example, ICF (2016) report that about 20% of the respondents' clients are 'business owners/entrepreneurs' (p. 15), while this research project survey received responses totaling 26% of business owners and sole proprietors. It is unknown if the terms entrepreneur and sole proprietor are considered to have the same meaning. However, the percentage of respondents' management clients is about 29% in both surveys, nearly identical. The percentage of executive clients is not similar, 40% for this research's survey and about 23% for the ICF (2016) survey. The reason for the discrepancy in this last category is unknown.

Another anomaly between the two surveys is regarding payment for services. Over two thirds (68.3%) of the respondents for this research project survey are compensated by the client's organization whilst 53% of respondents to the ICF survey (2016) are compensated by the sponsoring organization. The category or type of the organizations associated with the coachees of project survey respondents is reported as 79.9% for-profit and 20.1% non-profit. Comparisons on this topic were not available in the surveys reviewed in the literature.

4.5 Findings related to opinions, beliefs, and experiences about long-term coaching

Question three in the survey is multi-faceted question and takes the form of a five-point Likert scale specifically asking respondents' beliefs related to their long-term coaching engagements. This request for information is presented as twelve statements, generated from several perspectives. The goal was to elicit participants' opinions and practices related to their praxes in working with longevity clients. There was opportunity to provide written commentary at the end of the set of questions and a significant amount of comments were produced by the respondents. Figure 4.8 depicts the questions and the results for each of these questions.

Figure 4-8 Likert scale

Coaches' opinions about their long-term coaching engagements

(156 Respondents)

	STRONGLY AGREE	SOMEWHAT AGREE	NEUTRAL	SOMEWHAT DISAGREE	STRONGLY DISAGREE	TOTAL
I set goals with all my coachees regularly regardless of the of time we've worked together..	56.41% 88	30.13% 47	6.41% 10	5.13% 8	1.92% 3	156
I believe I have the same level effectiveness with all my coachees, regardless of the of time we've worked together.	35.90% 56	41.67% 65	7.05% 11	14.10% 22	1.28% 2	156
I maintain the same level of objectivity with my long-term coachees as with my shorter coachees.	52.56% 82	34.62% 54	5.13% 8	7.69% 12	0.00% 0	156
I sometimes become internally impatient with clients who are slower than I think they should at responding to coaching.	2.56% 4	32.69% 51	11.54% 18	26.92% 42	26.28% 41	156
I notice than my delivery of my coaching process is different my long-term coachees than my shorter term coachees as goes on.	19.23% 30	44.23% 69	6.41% 10	16.67% 26	13.46% 21	156
I find that I am less innovative my long-term coachees than my shorter term coachees.	1.29% 2	10.32% 16	5.81% 9	31.61% 49	50.97% 79	155
I have experienced concerns whether I get too close with my long-term coachees, thus undermining my objectivity.	1.29% 2	23.23% 36	10.32% 16	27.74% 43	37.42% 58	155
I find that when a coachee chooses to make a behavioral change, it is embedded more when long-term coaching is utilized.	25.16% 39	33.55% 52	21.29% 33	14.84% 23	5.16% 8	155
I have found that long-term business coaching sometimes leads to a break-down of clear boundaries between me and my coachee.	1.95% 3	12.34% 19	10.39% 16	38.31% 59	37.01% 57	154
I believe that maintaining a personal friendship with a while providing coaching to them is not relevant to my coaching effectiveness.	17.65% 27	18.95% 29	20.92% 32	21.57% 33	20.92% 32	153
I alter my processes to accommodate long-term coachee engagements.	13.64% 21	29.87% 46	10.39% 16	29.22% 45	16.88% 26	154
I maintain the same structure processes for meeting with all my coachees, both short and long term.	27.10% 42	32.90% 51	10.32% 16	23.23% 36	6.45% 10	155

Findings related to the coach's process from the Likert scale

The twelve statements are divided into three parts: process, approach, and beliefs. Four of the Likert scale statements focus explicitly on the coach's process while the other statements address aspects of the coach's approach, personal experiences and beliefs.

The four Likert scale statements related to process are:

- I notice that my delivery of my coaching process is different with my long-term coachees than with my shorter-term coachees as time goes on.
- I alter my processes to accommodate long-term coaching engagements.
- I maintain the same structure and processes for meeting with all my coachees, both short and long term.
- I set goals with all my coachees regularly regardless of the amount of time we've worked together.

. Illustrative comments regarding the coaching process:

'Processes evolve with longer term coachees in part because the trust levels have deepened, some history is shared and a greater freedom for openness is available with more efficient languaging.'

'Structure and process always depends on the coaches' goals and hereby vary.'

'The question seems to presuppose a standard process for coaching rather than the possibility that every client is different, and we can be fully in the moment with the client. I don't use a standard process for every client. Each engagement is custom to the situation and need.'

Approach of the coach statements explored through the Likert scale question

Four of the statements in the Likert scale ask about the respondent's approach to their client interface when working with their longevity clients. They are as follows:

- I maintain the same level of objectivity with my long-term coachees as with my shorter-term coaches.
- I have experienced concerns over whether I get too close personally with my long-term coachees, thus undermining my objectivity.
- I have found that long-term business coaching sometimes leads to a break-down of clear boundaries between me and my coachee.
- I find that I am less innovative with my long-term coachees than with my shorter term coachees.

Illustrative comments in relation to these statements are:

'I maintain à distance with my coachee during the coaching process otherwise it undermines my effectiveness as a coach.'

'I believe there may be some difference when one meets with long-term clients in person. My long-term clients have all been by phone - helping maintain more objectivity.'

'Long term relationships evolve toward highly differentiated coaching in the whole of time and context.'

Coaches' beliefs about themselves and their coaching from the Likert scale

The remaining four questions address the participants' views about themselves and their beliefs about coaching conduct:

- I sometimes become internally impatient with clients who are slower than I think they should be at responding to coaching.
- I believe I have the same level of effectiveness with all my coachees regardless of the length of time we've worked together.
- I find that when a coachee chooses to make a behavioral change, it is embedded more fully when long-term coaching is utilized.
- I believe that maintaining a personal friendship with a coachee while providing coaching services to them is not relevant to my coaching effectiveness.

Illustrative comments:

'Speed and Time-to-Result Accelerates with long term coachee.'

'I do not help clients solely with behavioral changes. The changes that are sustainable come from changing a way of being. I do not have clients has friends. Those questions will be irrelevant.'

'Where long term clients develop into friendships, I find that coaching effectiveness can be maintained as long as there are clear boundaries set by both parties, and that we review the partnership regularly as we would in any coaching engagement. This is not universally possible however with all clients / friends.'

4.5.1 Discussion about results from the Likert scale question

Statements related to process

Upon an initial read, the first three statements about how the coach views their process in relation to long-term engagements appear to have yielded differing answers. However, each of these statements offers a different consideration. Nearly two thirds of the replies (63.4%)

either strongly or somewhat agree that they notice that how they <u>deliver</u> their coaching process (first statement) is different with their long-term coachees. Less than a third (30.1%) either strongly or somewhat disagrees with this statement whilst a small group (6.1%) is neutral on the topic.

Questions arise; does 'delivery' mean a change in the process or perhaps in the model used over time? Or could it mean the intensity and depth exerted by the coach within their chosen process or model? Does 'delivery' include 'approach?' One can only surmise meaning from information provided by respondents in the survey.

The second statement asks if the coach chooses to alter the process that they use when working with a coachee long-term. Forty-three percent (43.5%) strongly or somewhat agree that they do alter their process whilst a slightly higher number, 46.1%, strongly or somewhat disagree. When asked to describe their own coaching process in a later question, several respondents describe their process as being 'free-form or free-style' from the onset of their coaching engagements. These two terms were mentioned nine times within the written answers to this question. In such cases, it may be that a coach does not alter their process but might alter their delivery due to increased knowledge and bonding with the coachee.

I posed the third statement related to process by asking the previous question from the opposite perspective. Interestingly, 60% strongly or somewhat agreed that they maintain the same structure and process for all their clients. This number is significantly higher than the 46.1% in the previous question who disagree at least to some extent that they alter their process. It is unknown what constitutes this difference. Though a considerable segment of the respondents noted that they alter their process over time in a long-term engagement, an even larger segment stated that they do not. Two-thirds of all respondents do state however that they notice that the way they deliver their process is different. Possibly, this distinction could be attributed to the approach of the coach with their client over time.

Other elements which could be said to relate to a coach's process that may not have been considered when responding to this statement are contracting, session frequency, length of sessions and continuing use of assessments. Each of these components could be deemed to be part of the structure of coaching (Dingman, 2004; Liljenstrand & Nebeker, 2008).

Possibly wording the statement differently to mention these elements might have elicited a different answer.

I designed the fourth process statement to address a ubiquitous 'best practices' tenet within coaching literature, that of goal setting (Blakey & Day, 2012; Grant, 2013; Lee, 2013; Peltier, 2001; Rogers, 2016). Whilst the majority of respondents (86.5%) strongly or somewhat agree that they regularly set goals with all their coachees, regardless of the length of the relationship, this practice was not unanimous. As has been discussed, coaching is a unique activity (Grover & Furnham, 2016) for each practitioner and variables within the coaching process, as well as the client's business setting, may render goal setting secondary to challenges and tensions the client is experiencing (Jones & Wallace, 2005).

<u>Statements related to the coach's approach</u>

When asked about maintaining objectivity, refraining from becoming personally close and honoring boundaries most of the respondents report being confident in their ability to retain a professional stance in relation to their longevity clients. The vast majority (88%) also answered that they continued to be innovative with their long-term clients.

Given the relative consistency of answers to these statements, it may be the case that these coaches are comfortable with themselves and/or know themselves well enough to understand how to address handling their coaching interactions while remaining objective and detached with their longevity coachees. The responses here appear to suggest once again that these coaches are, overall, comfortable with their ability to execute their role as a coach in a professional and consistent manner while at the same time, acknowledging occasional lapses in this area. The topic of maintaining boundaries is explored more fully when discussing the interviews in chapter 5 and in the data from both instruments in chapter 6.

<u>Coaches' beliefs about themselves and their coaching</u>

About a third of the respondents answer that they somewhat agree that they sometimes become internally impatient with coachees who appear to be responding slowly to coaching. Thus, many of these coaches have internal benchmarks and judgement regarding client progress whether they believe that they should or not. A question to consider here is what training or support can be offered to assist coaches with their own feelings. Most of the respondents view themselves as maintaining the same level of effectiveness over time with their clients. This belief could be viewed as an attitude of proven self-confidence and perhaps comfortableness with their coaching professionalism.

The vast majority, over four out of five, of respondents view their client's behavioral changes while being coached as being more anchored when the client is long-term. The topic of friendship with clients evoked a wide range of opinions. Over a third of the respondents believe that maintaining a friendship with a client is not relevant to their coaching effectiveness while about 44% disagree with that statement.

The findings show that the beliefs and praxes of respondents are diverse, seeming to represent a range of experiences and practices. This finding is commensurate with the assertation discussed earlier that both coaches and their interventions are unique (Grover & Furnham, 2016).

4.6 Findings from the open-ended questions

The survey included three open-ended questions for the purpose of giving respondents an opportunity to freely share their thoughts. The survey respondents were both generous and loquacious with their written comments, resulting in a plethora of data and a lot of ideas to be categorized. Answers and comments throughout the survey prompted a variety of responses, some of which may not be directly related to the coach's process or approach during long-term coaching engagements yet seem to be considered as relevant to the activity of long-term coaching as experienced by them (see appendix D for an example of the sorting and range of the respondents comments). The answers have been analyzed and themes identified within the questions. Illustrative quotes are provided for some themes. The three open-ended questions are presented as follows.

Question four: *Briefly describe the typical steps in your usual coaching process when beginning with a coachee (i.e. freeform, intake, assessments, goal setting, structure via a workbook, etc.)*

The purpose of this question is for respondents to identify, reflect on and describe their own customary coaching process, thus forming the mental foundation from which to consider any changes to that process that took place when/if the engagement became long-term. There were 144 responses with varying degrees of specificity. Themes that emerged are:

1. Process – model or system used by the coach as a framework to coach within
2. Contracting: a written or verbal agreement among all involved parties
3. First phase: how the coach begins to know and relate to their new client
4. Assessments: psychometric tools such as Myers-Briggs, Strength Finder and DISC and human development tools such as 360 Degree Feedback
5. Goal Setting: determining what the client wants to accomplish within coaching

1) Process – model or system used by the coach as a framework to coach within.

Many of the respondents named codified coaching models or systems (a structured process) they use to coach. Models specified by the respondents include the E 4 System, GROW, SMART, Paperroom, Accountability Framework, AnD Coaching, the ICF process, and IPEC. Several respondents wrote about 'structured programs' they had personally developed and now use, and nine individuals described their process as being 'free style' from the beginning of the engagement.

2) Contracting: an agreement, written or verbal, among the coach, the client, and the organization.

When describing their typical coaching process, thirty-six of the coaches (24.3%) explicitly refer to contracting in some form, either with the coachee or with the client's organization, or both. Phrases used to describe setting up these coaching arrangements include; the terms of contract, contracting, program agreement, coaching commitment, letter of commitment, coaching agreement, and agreement-in-writing. Here is a sample of survey comments alluding to an agreement being made:

'overview of services and expectations'

'I have a structured program with a start and a finish.'

organisational alignment through 3-way session'

Conversely, some respondents did not describe using a contract at all. Illustrative comments include:

'intake conversation only'

'goal setting and free form'

3) First phase of connection in a new coaching engagement.

Nearly three quarters of the respondents (74.3%) specifically refer to mindfully using a process to get to know about and understand their new client. The three most common phrases used to describe this process are 'intake meeting,' 'discovery session,' and 'history taking meeting.' Seven coaches use the phrase 'chemistry check' and three more refer to an initial interview or meeting to determine if there is common ground and synergy between the parties. Six of these ten coaches described the meetings as taking place before agreeing to work together, and the other four coaches wrote that they evaluate this commitment as a part of the first coaching session. Having this information only in writing to review, it is not possible to account for the viewpoints or processes related to getting to know a new client among the 25% of respondents who did not address this topic in their answers.

4) Assessments: psychometric and human development tools.

Sixty-six respondents (44.6%) listed the use of assessments as a part of their coaching process. Reference to specific products (personality assessments) include DISC, 360-degree feedback, Wheel of Life, and Strengths Finder. Some individuals used assessment questionnaires they have designed themselves for the purpose of getting to know and evaluate a new client. Most of the respondents listing assessments as a part of their process, however, did not specify a type used.

5) Goal Setting: determining what the coaching engagement is going to address.

The vast majority of the 144 respondents (119 individuals – 83.1%) used the terms 'goals' and 'goal-setting' when describing their coaching processes. Other similar or related phrases include set objectives, targets, the outcomes desired, determine needs, development planning, agree what the way forward should be, and determine the focus. Though most of the respondents state that they set goals with new clients, others describe their own specific approach, alluding to what was to be accomplished in the coaching sessions, though not explicitly using words that could directly be interpreted as goal setting. At the other end of the spectrum in contrast, a small minority (two respondents - 1.4%) were clear about not setting goals with clients. Their description of their process is as follows:

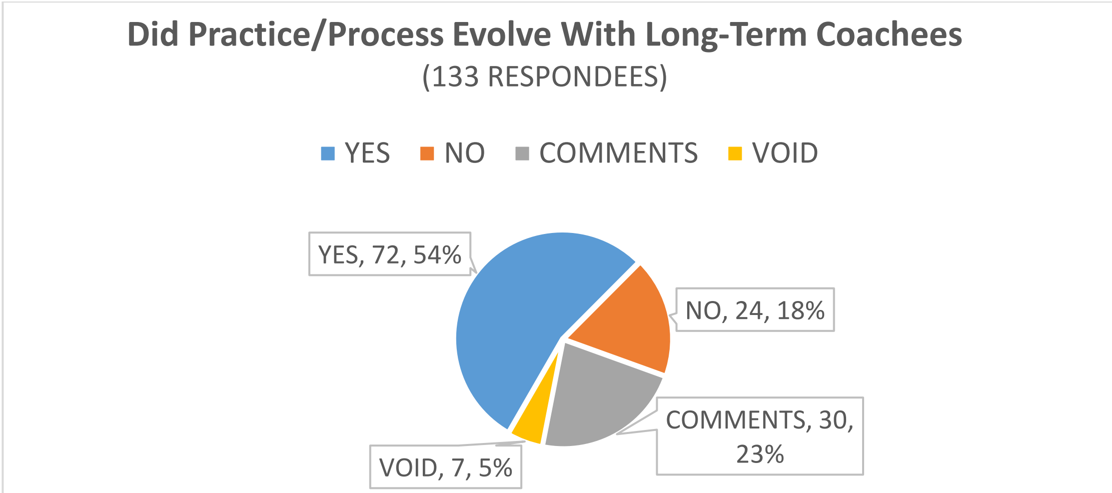
'responsive freeform according to how the client wants it'

'free form listening'

<u>Question five</u>: *Please consider both your usual process and your answers above regarding your experiences and views of working with long-term coachees and comment on if/how your model of practice and process may or may not have evolved related to your work.*

I posed this question with the purpose of having participants reflect on their foundational process as they had described it in question four and so that they could identify if and how that process changed when an engagement became long-term. There were 133 responses with varied results as depicted in Figure 4.9. A majority of respondents, 54%, answer that their process does change when working with a coachee over an extended period of time, while 18% stated that there was not a change to their process. Thirty individuals (23%) offer comments not relating to their coaching process and thus these could not be categorized in the same ways as the others (they are addressed below) and 5% of the responses (seven individuals) were void with: one person leaving an empty space, another writing 'no comment' and five stating that they did not understand the question. As Figure 4.9 details, ninety-seven participants answered the question directly about their coaching process related to long-term engagements. Addressing this subgroup, 75.3% answer 'yes' their process does change, and 24.7% answer 'no,' that their process does not change when working with a coachee long-term.

Figure 4-9 Process change/no change with long-term coachees



As stated in the Activities section 3.6 and illustrated in Appendix D, within the categories of 'Yes,' 'No' and 'Comments' (CMNT), the respondents spoke to other topics and this data was also identified though not analyzed as it is not the remit of this project.. Eliminating the seven voided respondents, findings the remaining 126 answers are categorized into seven themes as follows:

1. Process – changes identified
2. Process – no changes
3. Approach with the coachee over time
4. Meeting frequency – the time between meetings and, the length of meetings
5. Relationship – development and evolution of the coach-client relationship
6. Coachee participation and reactions to long-term coaching engagements
7. Comments related to practicing as a coach, including self-reflection

1) Changes to the coach's' process in long-term engagements.

Survey responders offer a wide array of thoughts and information about changes to their processes when working with clients over an extended period. Recurrent observations include: the need (and also the opportunity) for the coach to develop more in-depth processes as compared to those used at the beginning of a relationship, becoming more creative and innovative in expanding core models to accommodate the coachee's growth over time, and having the ability to understand and draw on a rich history that has taken place between the dyad. This allows for the adaptation of tools used by the coach to meet the coachees' needs. A frequent observation was that processes shifted in the direction of less structure and toward more of an open format (termed free-style or free-form by some), sometimes with the client leading the agenda over time. The respondents present most of these changes and evolutions in a positive vein. Such a process can be seen in this illustrative comment:

'There is quicker recognition of coaching edges, less drama in the conversation because we have built long standing patterns that allow us to get to the issues quickly. The client has also been conditioned over years of coaching and knows where the conversation is going ...accountability, choice, action, etc.'

However, not every change within the coach's process during long-term engagements is viewed in the survey as either being positive or a step forward. Two cautionary concerns:

'I think it loses some traction and a sense of laziness creeps in.'

'My view on how a client may respond may sometimes (be) coloured because you know them well.'

2) No change to the coach's process in long-term engagements.

Respondents who stated that they do not make a change to their process when working with coachees for an extended period of time offer viewpoints and beliefs on why not. Some comment that their process is iterative, that it is targeted at achieving goals and when those goals are reached, new goals are set using the same format and process. Along that line of thinking, one respondent observes that in today's rapidly changing environment, her long-term engagements could more accurately be characterized as:

'…a succession of short-term coaching engagements with the same coachee.'

Others eschew a 'workbook approach' to their coaching, noting that since every client is unique, so is the coaching process used with each coachee, unrelated to the amount of time spent together. Several comment that though their processes do change and evolve over time they attribute those changes to their own learnings and growth as a coach and view them as unrelated to the length of the engagement. Representative comments include:

'The evolution of process and tools is more of a factor of my professional development not the length of time I have worked with the client.'

'Same process, we will redo the goals if they don't fit anymore if person achieved them. May do more assessments and new exercises since we go in new directions.

'No difference - it is always the client's agenda.'

'Sometimes more relaxed but otherwise not significantly different.'

3) Approach of the coach toward the coachee over time.

Whether their process changed or not, most of the respondents state that their approach to the coachee did change over time in a long-term engagement. Descriptors of this change include phrases such as being more flexible, asking more relevant questions due to knowing and understanding the coachee better, an ability to establish rapport more quickly in each session, being more fluid, and being less formal.

'Working with clients long-term allows me to "short-cut" observations which allows us to move forward more quickly. Example: I can say to a client "We both know you are resistant to confrontation so how are you going to handle....?" Also, I think the level of trust my clients have in me because of my contributions to them over time allows me to, perhaps, be more "edgy" and they are more open.'

A few participants note that their approach within a long-term engagement sometimes evolved over time not just with the coachee, but in relation to the other stakeholders involved in facilitating the coaching arrangements. These changes include less communication with the organization's management and sometimes less rigorous contracting. On the other hand, some coaches developed new approaches in regard to their relationship with the coachee's organization over time, such as performing 'mini-360's' and adding additional 3-way quarterly meetings among the coach, coachee, and the coachee's line manager.

4) Session frequency between the coach and long-term coachees.

The subject of meeting frequency between coach and client arose several times. The overall perspective of the respondents was that scheduled meetings tend to be more consistent and frequent in the beginning of a coaching engagement and less so as time went on. Some representative remarks on this include:

'Shorter term engagements form part of a coaching programme and have clear objectives. Longer term engagements typically emanate from shorter term engagements and may be ad hoc when the client wants to work on something specific, or at less frequent intervals.'

'All longer term coachees are not in structured programmes, but on-demand. It may entail as little as one to three sessions per year.'

'Session with long-term coaches would be less frequent.'

5) Relationship-development and evolution of the coach/client relationship.

When considering possible differences in their process and approach between short-term and long-term coaching engagements, respondents often specifically differentiate between the process or model they use to coach and their relationship with the client. Several indicative comments to this effect include:

'The process is not any different; what's different is that due to the length of the relationship, goals shift and change over time, and the establishing of client rapport in each session is much quicker. I check in with all my clients on personal updates (vacation or work travel, family events, etc.) regardless of the length of the relationship. What's different with long term clients is that I'm following the client's life and career in a more holistic way over an extended period of time.'

'The practice and process stay unchanged for the most part. What evolves is the personal relationship, and that changes the nature and language of the coaching interaction.'

'With longer term coaching relationships, there are opportunities to explore much deeper and broader, as the coachee develops and our relationship evolves.'

'With my long-term clients, I coach pretty much the same as with any client, however, I think I can sometimes be more innovative with them because of the level of trust.'

6) Coachee participation and reactions to long-term coaching.

Some respondents offer thoughts on how the coachees grow and evolve from being part of a long-term coaching engagement. They seem to attribute having a long-term engagement, in part, to the characteristics of the client being coached. Illustrative comments are as follows:

'Long term coachees embrace the process and anticipate what they bring to the session.'

'Long term coachees tend to be more familiar with coaching concepts and after a while, have become more self-aware, more self-authoring, and accountable. They also tend to be quite open and constantly curious about their development. The people who get the most out of their coaching, and continue longer, are those who engage in the processes in their own way, and do not feel held down by them.'

'These individuals are often very self-driven, and we do not focus on goals as they have no need to partner on this in their lives. they do this by themselves.'

7) Growth, opinions, and coach self-reflection.

Several of the comments written in answer to this question asking about the coach's process instead centers specifically on the coach's growth. Some such observations are attributed to the years of practice and experience of the coach, and some development is attributed to the nature of a long-term engagement. Still other comments not related directly to the coach's process offer instead cautions and the limitations of coaching in long-term engagements. The following statements demonstrate such reflections:

'As my coaching practice, skills and process evolves, I bring a stronger coach to my long-term clients. I may introduce a new concept I've studied. I become stronger, more deliberate and take more risks. They benefit from that'.

'Obviously when your coach someone for a long time there is a trust factor In play. just by the evolution of the coaching relationship you get to know each other better so you have to make sure that you keep coaching environment and not get sucked in the new stories that are not relevant to the coaching process.'

'My experience of such cases brings me to think that the global coaching process is respected, but I lose a part of my innovation ability with time. I keep my ability to confront, to stay relatively objective, but of course, knowing the scenario, the automatisms and the success paths of the coachee, I tend to use a certain category of protocol, may be with a possible side effect : a reduction of the number of tools used.'

Question twenty-nine: *Any additional comments and observations regarding your experience with long-term coachees and their impact on your coaching process*.

The survey includes this final request to provide respondents with the opportunity to freely offer their thoughts without being restricted by the parameters of answering a particular question. There were forty-six comments. Some of the respondents used this space to make general observations unconnected to the research. For example, thanking me for the opportunity to contribute. Others reflect on and share their views on the topic and experience of long-term coaching separate and distinct from their process and approach. The themes broached are listed below, followed by an illustrative quote for each topic.

Benefits of long-term coaching engagements (seven comments)

'There can be an ease (more mutual trust) and mutual learning that occurs with long time clients.'

Definitions of what constitutes a long-term coaching engagement (two comments)

'Generally, I consider long term coaching to be anything over 9 months, so I would say that there are more that fall into that category. Many of them dip and dip out; ie come back for short spells over a long period of time. They are probably the most rewarding client relationships (for me) and I believe it is the same for the client.'

Cautions about long-term engagements (three comments)

'...coaching can never be effective over the long term if the coach's relationship to the future is a 'get to' (goals) rather than a 'come from' (vision) orientation.'

Coachee participation related to long-term engagements (six comments)

'I find that the greatest advantage with long-term coachees is that they know the value of coaching thus come to sessions highly prepared and ready to do the hard work of going deep, fast."

Respondents thoughts about their own experiences and feelings (fifteen comments)

'I find it very rewarding to see first-hand a few of my long-term coachees being happy when reaching their major career milestones.'

Thank you and best wishes (eight comments)

'Thank you for the opportunity to participate/contribute.'

Uncategorized (five comments)

'Happy to speak and give more input if required.'

4.6.1 Discussion of findings from the open-ended survey questions

Question four is the first of the open-ended question and asks for a description of the respondent's usual coaching process. The purpose for asking this question was to provide each coach the opportunity to reflect on their own way of conducting their coaching practice. Though divergent systems, methods and philosophies are presented, there is a consistency to the reiteration of steps taken (not always in the same order) when beginning and conducting a coaching engagement. Five considerations emerge from the answers describing respondents' processes:

1. Process and approach -framework (model of practice) or system used by the coach
2. Coaching contracts – are they used?
3. The coach's method for beginning to know and relate to a new client
4. Assessments (psychometric tools) - when and if they are used

5. Goal Setting - determining what is to be accomplished

These categories, viewed as an overarching outline, both separate and distinct from specific typologies such as models or systems, bear similarity to, and are consistent with, Dingman's (2004) six step development and Liljenstrand and Nebeker's (2008) seven category breakdown of coaching phases.

Respondents coaching processes and approaches

This group reports a wide variety of models and systems that they work within. As presented in the findings, many of these systems are recognizable standard coaching models (such as GROW, the ICF process, and IPEC), while others are customized and in many cases, created by the coaches themselves. This research study did not focus on the types of processes used by coaches with long-term clients, but rather on any change or shift that occurred within that chosen process over time. The respondents' approaches leading up to, and in preparation for a coaching engagement are also varied. Some contract before meeting the client to be coached, others meet with the potential client first before meeting with stakeholders within the organization, and so on.

Contracts

When coaches describe their framework for working with clients, only about one in four refer to contracting. This low ratio is interesting given that the subject of contracting and its importance in the field of coaching is being increasingly documented in literature (Turner & Passmore, 2018). Those who did comment directly about the action of contracting used an assortment of descriptors including contract, contracting, agreement, coaching commitment, and letter of agreement. However, it is unknown if a larger percentage of this group of coaches use some form of formal contracting and simply did not address this fact directly. Blakey & Day (2012) state that as coaches engage with a client, they are creating contracts all the time, albeit informal and sometimes unstated. Alternatively, Lee (2013) has suggested that the formality of contracting is an important component of executive coaching. He contends that contracting is a means of defining boundaries and the specific way in which coaching can assist the client. specifics of the assistance the coach is offering. The collective answers of these survey respondents do not appear to indicate agreement with that stance.

<u>The coach's method for beginning to know and relate to a new client</u>

It is hardly surprising that a large majority of the respondents wrote about getting to know and relate to the client as a part of their process considering the emphasis on the importance of the coach/client relationship established within coaching literature (section 2.4). Indeed, knowing that all of these coaches have a minimum of two years' coaching experience, it is not unreasonable to extrapolate that though not explicitly stated by some, each coach has a method or means for establishing knowledge of their new clients.

<u>Assessments – psychometric and human development tools</u>

Close to half of the respondents (45%) list the use of personality evaluation tools as a part of their process in working with a client. A variety of these products are mentioned by name however, many respondents use the term 'assessments' generically. As suggested by Liljenstrand and Nebeker (2008), coaches may tend toward using assessment products, or eschew the use of assessments at all based on what they have been exposed to in previous careers, or in their continuing education as a coach. There is no immediate evidence from the survey of a correlation between the use of assessment tools and long-term coaching engagements. Assessments, when used, appear to be generally administered at the beginning of an engagement (although at least one coach wrote about using post-360 instruments). Perhaps therefore it can be surmised that their relevance to a change in coaching process in long-term engagements may not exist. Nonetheless, it could be an interesting consideration for future research to investigate if there is a correlation between the use of assessments and the creation of long-term coaching engagements.

<u>Goal Setting</u>

The starting point for nearly all of the respondents when entering a new engagement is to determine the purpose of the engagement, to inquire about the goal or goals the client wants to accomplish. This starting point is consistent with the ubiquitous definitions of coaching found in the coaching literature, some of which has been provided in sections 1.10 and 2.3. A commonality among them is that nearly all allude to the coach working with the client to achieve the client's objective. As discussed in chapter 2, coaching is distinct from other helping interventions such as counseling or mentoring, in part due to its call to action by defining what is going to be accomplished within the dyadic relationship (Rogers 2016). It appears from the results of this survey that the preponderance of respondents operates under this premise. However, consistent with the coaches' responses to the Likert scale question, the belief in the need to always begin a coaching engagement by setting goals was not unanimous when answering this question.

<u>Changes and lack of change to the coach's processes and approaches in long-term engagements</u>

Following the question asking for a description of their coaching process, respondents were asked: *Please consider both your usual process and answers above regarding your experiences and views of working with long-term coachees and comment on if/how your model of practice and process may or may not have evolved related to your work with them.*

Three quarters of the respondents (seventy-three individuals) who answer this question directly say that their process does change when engaged with a client long-term. Several comment that the container of the long-term relationship itself both necessitates and allows for the development of ever expanding and creative in-depth processes to accommodate the growth of the client over time. Perhaps such engagements provide a unique kind of growth opportunity for the coach and the client alike. If so, such opportunities may be fortuitous for the coach given de Haan's (2008a) opinion that a coach learns the most from their own coachees (p. X).

Those who state that their process does not change over time due to being in a long-term engagement appear to fall into three mindsets. There is the group who says that they are completely free style from the beginning, customizing as they move along for every client and that in this way the 'process' is not different over time. The second group views their process as cyclical, in which a process is replicated as needed so that when goals are completed, new ones are formed. Finally, some coaches note that they, as professionals, are continuously growing and evolving and as a result, so do their processes, irrespective of the length of time they spend with a client. This last set of coaches raise an intriguing point. Is there a stage, a sweet spot so to speak, where the growth of the coach and their process cojoins with the longevity of the engagement to enhance both? Asked another way, for these types of engagements, is the sum of the whole of the combined growth and learning greater than the individual (parts)?

Due to a lesser number of comments on certain topics, it is reasonable to speculate if some factors related to the overall coaching process were not considered or addressed by respondents when answering this question. One such factor may be meeting frequency, which most coaches report declines with longevity clients. Another factor is the subject of contracts, such as possible changes making the conditions of the engagement more open when re-contracting or whether contracts continue to be used at all. A third factor is the delivery of the chosen process, for example if there are degrees of depth within the process that change over time, due in part to the approach of the coach., those degrees of difference might be considered a change in process.

The approach of the coach toward a longevity client appears to be inextricably tied to the relationship between them. The level of trust, knowledge of the client's habits and beliefs, and understanding of coaching as a co-participating process all emanate from the relationship forged. Respondents say that due to the development and strength of the coaching relationship, they are often more direct and challenging while at the same time being less formal and or formulaic. These respondents also note the client's role in participating in a long-term coaching relationship. Observations offered about long-term clients include that they are at ease and familiar with the coaching process, that they are self-aware and want the accountability that being in a coaching relationship offers.

<u>Non-directed comments from survey respondents about long-term coaching</u>

Within the forty-six comments made in response to the invitation to share final thoughts there exists a variety of commentary. Thirteen comments are unrelated to the topic of long-term coaching per se. The other thirty-three relate to five themes connected to their long-term coaching experiences: the benefits both to the client and to themselves, personal beliefs concerning length of time at which an engagement is considered long-term, cautions related to the coach's responsibilities, coachee personality and attitude, and reflections about long-term engagements.. A significant factor here may be that a number of respondents consider long-term engagements to be a normal enough part of their client rosters to comment on them.

Chapter 5 Interview Findings and Discussion of the Findings

The next phase of the project after the survey closed was to conduct interviews. Findings from the interviews are presented in the first half of this chapter followed by a discussion expanding on their content in the second half.

Interview Participant Profile (22 Interviewees)

50/50 Female-Male (11/11)

6-45 years' experience (17.9 yrs avg)

*** 6 countries (U.S.A. majority w/ 12)***

73% use a model to coach

100% agreement on shift in approach

Ethics are a concern for this group

68.2% neutral about LT coaching

5.1 Interviews: Introduction of the findings

Eligibility for participation in this project, as detailed in section 3.3, does not include gender, country of origin, or regions of practice. Hence, these details were not considered when selecting interviewees though all met the stated profile criteria. As detailed in section 3.7, twenty-two interviews were conducted – fifteen coaches were selected randomly from the survey and seven coaches were convenience volunteers who arose through collegial conversations with me during the survey phase of the project. To assure anonymity, I have assigned each interviewee a code name ranging from C1 to C22 and refer to each in this manner throughout this document.

Throughout the semi-structured interviews, the coaches generously and thoughtfully consider and reflect on their own processes, approaches, skills, habits, and perceptions related to coaching. They all examine how working with a client long-term impacts on each of these components of their work. Each interviewee seemed both comfortable and glad to take the time to reflect on their practice with several specifically expressing gratitude for having the opportunity to consider their own practices and praxes in a reflective, focused way. Twenty-one of the interviews were held in a conversation format and lasted between thirty and sixty minutes and I conducted only one in writing.

Analysis and coding of the interviews was conducted within NVivo as described in section 3.8. A sample from one interview is provided in Appendix H. Among the 22 interview transcripts, 510 references of interest were coded into 15 topics (see appendix G). From the 15 topics of interest, 8 themes were ultimately categor4ized. These 8 themes are presented in section 5.3.

Themes related to long-term coaching along with a plethora of thoughtful reflections on the topic of business coaching in general are identified. Findings from the interviews and the changes (and/or lack thereof) to the coach's process and approach during those engagements are presented below, augmented with illustrative quotes to both expand on, and support the findings. In concert with the phenomenological approach used to analyze the data, some of the quotes are lengthy in order to fully capture the meaning of the interviewee.

5.2 Demographics of the interviewees

Tenure as a business coach ranged from six to forty-five years within this group of practitioners, with a mean of nearly eighteen years (17.9 years) practicing within the coaching profession. The longest period of time this group has coached any one individual or group ranges from two to twenty-one years with a mean of 7.5 years. Two interviewees specifically comment on their first long-term engagements, which occurred very early in their coaching careers.

The group is comprised of eleven men and eleven women. Whilst this gender distribution is an even split, the selection occurred by random coincidence and was not intended to be representative of the gender make-up of the coaching practitioner population. Twenty of the interviewees are external coaches, one is an internal coach, and one practices both as a manager-as-coach and an external coach.

Six countries are represented among the interviewees:

- Canada 4
- Germany 2
- New Zealand 1
- South Africa 1
- United Kingdom 2
- United States 12

5.3 Themes and the associated findings which emerged from the interviews

It is useful to know that exploring this topic did not take place as a linear conversation for the interviewees. In the interviews, each coach considers and talks about multiple aspects of their longevity relationships, telling stories while zooming in and out of their processes, their understanding of themselves, their clients, and their schools of thought as these topics arise within their thinking. The meaning and intent of each conversation has been carefully preserved and I draw out illustrative quotes throughout to demonstrate thinking explored in this chapter. Some of these quotes are lengthy when deemed helpful to capture the full meaning of the interviewee. A sample of the raw data (a full transcription of one interview) is presented in Appendix F. From the interviews, the following themes emerged as a result of performing phenomenological thematic analysis:

1. Process used by the coach
   a. Changes
   b. No Change
2. Approach of the coach to the client
   a. Changes experienced and implemented
   b. No change
3. Relationship between the coach and the client
   a. Friendship
4. Ethics interviewees raised related to long-term engagements
5. Contracting – agreement among the coach, the coachee and the organization
   a. Frequency of meetings, packages
   b. Maximum number of coachees at a time in the coach's roster
   c. Termination of the coaching engagement
6. Client expectations when working with a coach for an extended time
7. Characteristics of the long-term client as observed by the coaches
8. Bias and beliefs of interviewees regarding long-term coaching

To provide the context and an understanding of these themes, this chapter is a wide-ranging depiction of the reflections, common experiences, and coaching realities of working with longevity clients as expressed by the interviewees. Findings that relate to the eight themes and their subthemes are presented in the order listed.

5.3.1 Process used by the coach

A finding that surfaces from the interviews is that when these interviewees work with a 'longevity client' (a term use by C2 and taken up and included throughout this paper) the process or model, if one was initially used by members of this group, is eventually always set aside. In these cases, the flow of the coaching moves away from a specific process or method of coaching into a state of simply actively being present whilst the client sets the agenda.

Sixteen of the participants (72.7%) state that they begin new coaching agreements working within the framework of a model or system (i.e. GROW, Tribal Leadership, NLP and others, with some of the models and systems used having been created by the coaches themselves). Each of these coaches describes naturally shifting away from their chosen process or model over time. None, however, abandon the model used completely. Many from this group spoke of referring back to the concepts and language utilized within those initial models as a means of drawing on what the client is already familiar with. In effect, though not practicing any longer fully within the framework previously used, certain specifics from that framework remain as additional tools for the coach to use in relating to and with the coachee.

The term 'tools' is a metaphor used by coaches to refer to exercises and techniques (separate from coaching processes or frameworks but often used within them) that encompass an infinite variety of stratagems. Herein is a sampling of tools discussed by the interviewees which they view as a part of their metaphorical toolkit: questionnaires, personality assessment instruments (360 feedback, Myers Briggs, DISC, Emotional and Social Competencies Inventory, and so on), the Chimp Paradox, stages of Tribal Leadership, books and articles to read or listen to, journaling, Wheel of Life, analogies, forms and systems developed by the coach, and all manner of 'homework assignments.' All of the interviewees refer to the many tools they understand and utilize on a regular basis, noting that these tools change and/or evolve as required throughout the life of the coaching relationship.

The remaining six interviewees (27.3%) each said that they do not begin a coaching assignment using a systemized model or standardized process, but instead customize to each client from the beginning. This 'free-style' process continues throughout the relationship, regardless of the length of time involved. Coaches within this group spoke of their coaching technique as evolving within their free-style process due to the growth of their client as well as their own (discussed later in this chapter). It is clear that among the interviewees, regardless of the model used (or lack of one), a longevity assignment impacts the toolkit and skills. C1 comments:

'The impact on me when I coach somebody a long time is that I'm more challenging.'

Reflecting on her standard protocol, C19 provides this example of how her process changes:

'…so, the tool was a tool…and a lot of clients, at some point, decided to let it (drop). I just (say) 'okay, let's have a coaching conversation around that.' So, for him, I needed to become kind of flexible and to be innovative. Because his needs were different from the needs of a new client for example.' (researcher's note - English is not the first language for this interviewee, resulting in gaps in the quote.)

Regardless of variations to their process, all of the interviewees state that in their long-term engagements, the relationship itself evolves (see section 5.3.3). As C10 describes:

'It's about the same (the structure of the coaching meetings), but it's borne out of a long, long, long, long sense of trust.'

However, the interviewees were all careful to note that the coaching basics (as described by several in this group) of being fully present, listening intently, and asking relevant questions remain the foundation of all their meetings. C9 provides the following illustrative quote:

'Because in all of that, my job was to stay the coach. I grew to love these people. I was always cheering them on. But, I had the responsibility toward edgy questions.'

5.3.2 Approach of the coach toward the client

For most of the interviewees, the coach's approach (demeanor and delivery) with a longevity client (separate and distinct from the framework of the coaching process or model if one was being used) evolves over time to be more direct, less formal and often more challenging. The previous comment by C10 is illustrative of the collective view of the interviewees which is that they attribute the evolution of their approach to the deepening trust and intimacy of the dyadic coach-client relationship (see section 5.3.3). This reflection from C15 is similar to sentiments expressed by most of the interviewees:

'The feedback can be more…not that it's more direct, but it…there's a relationship that has developed so that the clients expect me to be totally honest. And even though that's always been the case from the beginning of the relationship, we have a rapport developed so that it's easier for me to say 'hey, you know, caught ya on that one. Same thing you've been doing for a while and here you are doing it again.' Where at the beginning, it might be a more delicate approach.'

Although not the focus of this project, a few interviewees appear to know about theoretical approaches (see section 5.5.2) and comment about their own; two identify their theoretical approach as being ontological and one specifically describes hers as being NLP. Another interviewee describes her varying approaches to coaching as choosing to use whatever theoretical approach works at the time; she states that she draws from the 'disciplines' of positive psychology, solution focused thinking, and NLP, depending on what she thinks is helpful for the client (C14). In this last example, the interviewee did change her approach within a coaching session as she deemed it to be productive to and for the client. To be clear, she describes this tendency to shift between disciplines as her style in all coaching interactions, not only her long-term engagements.

5.3.3 Relationship between coach and coachee – development and evolution

Knowledge of the client and development of the relationship within the engagement clearly becomes an additional tool for the coach to use in service to the client. There was a commonality of experience among all twenty-two interviewees (100%) who speak about the relationship between coach and client as being an important component to a successful coaching intervention, and particularly relevant to their experiences within long-term engagements (see following quotes).

Whilst all the interviewees met the base criteria for this research, many had their own criteria for how they personally define long-term coaching, ranging from six months to several years. This point is significant because all the interviewees comment on the progression and evolution of their relationship as a significant factor when coaching with a long-term client, regardless of how each defined the meaning of the phrase 'long-term.' Though the timing in which they suggest for this progression takes place varies (refer to section 2.6 for discussion regarding the duration of coaching engagements), the observations about this relational shift are consistent as this sampling of illustrative quotes demonstrates:

> *'I see the relationship much more like a partnership rather than a service. So, it grows more as a team or a partnership type relationship, I think, over time. And again, I think it tends to evolve less on the coaches' agenda and more to situations that the coachee may find themselves in.'* C16

> *'So, I find that it's easier to dig in, go deeper, and be more relaxed and in some ways, maybe even work harder. Because we are working as a team rather than as the coach and the client'.* C15

> *'It (long-term engagements) has great benefits in terms of the kinds of depth of relationship and knowledge of each other that you can know that's really useful and powerful.'* (C14)

Also expressed by several of the interviewees is an open acknowledgement of the psychological benefit to the coach when working with a longevity client. C20 reflects on why long-term engagements are powerful for him as a coach:

> *'I guess it's like any relationship…you know, a loving relationship with a partner. I'm sure people can learn a lot about themselves by dating many people. But when they're willing to go deep with one, I think there's…it's just a whole different level. Not better or worse, but it's just a whole different level of discovering who you are. And what makes you tick and how you work.'*

Along similar lines, C21 speaks frankly when describing her coaching preferences:

> *'I could say without getting intimate, I love my clients, I fall in love with them. When the coaching sessions end…I have to let them go, release them out of my space and mind and heart. I don't like that. I love working with clients for a long time. And I see them grow and evolve and have this deeper impact, which obviously, in a short-term, I can't have that…to witness that, it's such a joy and honor and that is only possible in long-term relationships.'*

Throughout the interviews, the coaches define the relationships forged within their long-term engagements using phrases such as collaborative, rapport, trusting, comfort, intimacy, and vulnerable. These qualities and values are ubiquitous when describing coaching relationships in literature on coaching in general. However, the interviewees ascribe differences to these qualities within their long-term relationships as being degrees of depth. Additional descriptions include psychological safety, commitment, deeper understanding, and depth of knowledge. These qualities are deemed by the coaches to be the result of the dyad growing both separately and together over time in easy and sometimes more challenging ways. As C10 observed:

'No long-term relationship is without conflict so that means we've also gone through conflict and have resurfaced.'

Friendship as part of the coaching relationship

Nine (40%) of the interviewees give opinions, and share personal experiences related to the concept of a friendship developing with a long-term client. C15 offers a rich description of the difference between new and long-term clients on this subject:

'We don't become friends, but there is a greater, a deeper connection. And the way I explain it sometimes to people that I'm training is that…you grow to care about one another as human beings at a different level…so I have been asked 'how was your weekend?' or, you know, 'what are you doing for the holiday?' or what have you…just little things. Where the new client, it would be; okay, we're in a coaching session, period. So, I find that that happens more with long-term clients. Because you do get to know things about them that you wouldn't in three months.'

C13 expresses a similar point of view:

'…with the clients that I've been coaching for many years, I wouldn't say we're friends, but we do have a relationship based on trust.'

C17, however does describe trust as a type of friendship:

'…you end up with a very, very strong friendship with most coachees because they've been to parts which…that they go to with their best friends. They're critical friends in life.'

While some of the coaches acknowledged forming friendships with their clients over an extended period of time, there was a collective stance regarding how they believe they should conduct themselves within the professional coaching relationship. This position is well reflected in C14's observation:

'And, as a coach, always making sure that that's what I'm being. You know, a coach, and not a mate.'

C19 speaks about the mutuality of commitment when a friendship develops, both to the coaching space and to one another:

'…we trust that our relationship is professional, and we won't…we won't be a friend during the process'

5.3.4 Ethics associated with long-term engagements

A common consideration of this group is the topic of ethics related to the coach and their adherence to coaching standards. The interviewees collectively say that their understanding of such standards develops from a number of sources: various professional coaching organizations (most coaching organizations have a professional code of ethics members must agree to abide by as a condition of membership), accepted good business practices, personal values, and pure intention by the coach to be of service.

Some of the coaches have personal experience with what they characterize as ethical issues that have arisen related to their long-term work. Whether the coach has directly experienced ethical issues or not within their own practice, all the interviewees raise cautions of possible ethical violations that could develop from being in a coaching relationship with a coachee for an extended time. This shared focus on ethical behavior within a coaching relationship was striking in its unanimity and may be the result of a level of maturity within this group of seasoned practitioners who have experienced a broad variety of professional coaching situations. Several of the interviewees are candidly forthcoming, both in identifying incidents of their own failure to maintain what they understood to be proper coaching ethics in a long-term engagement, and, in describing how they (as a coach) worked through those incidences. Here is an example of a situation experienced by C20 in a long-term engagement:

'I do think there is a danger I've noticed. A danger of just…like I said, getting too comfortable with the client and not speaking those important kernels of truth that they really need to hear. To ensure their success. Less candor…you know, I'm becoming more mindful of the dynamics and the sensitivities that exist in the company. And…I'm wanting to be…I might not always speak a truth that needs to be spoken as a result of 'oh, you know, this dynamic over here and that person, I don't want them to get fired or hurt or whatever.' For me at least, you know, that's not the edge they're hiring for, hiring me for.'

C16 does not describe a personal experience of an ethical failure but contributes this ethical observation about familiarity:

'I believe that it's likely if you're not rigorous, to actually have a diminishment of the effectiveness of coaching over the long-term. Primarily because of familiarity and lack of rigor as a consequence of proximity.'

When asked how he guards against this outcome, he replied:

'…I think to be an effective coach, you need to be absolutely non-attached to the behavior or actions of the coachee. So, if I'm not okay with you not acting, or if I'm not okay with you failing, or if I'm not okay with you choosing something different than I'm proposing, then I'm starting to relate to you much more like a manager and less like a coach.' (C16)

C16's thoughts are echoed by most of the interviewees. In addition to 'familiarity,' several interviewees raise cautions regarding a lack of rigor and complacency as ethical snares that the coach actively needs to guard against. C14 describes times of complacency that have occurred within her own practice:

'Occasionally, I have fallen into the trap of following what my coachee wants and what's coming up in this session or the same personal whatever. And if it goes on too long, in my experience, you can lose your way a bit. What are we doing here?'

Sixteen interviewees (72.7%) express concerns regarding the risk of dependency developing within either the client or the coach during extended engagements. These interviewees deem dependency to be a negative factor in the coaching relationship and an unethical state of being within the relationship. An example by C6 illustrates the belief held by many of the coaches that the efficacy of long-term coaching is 'situational,' and she augments this belief by describing a particular coaching experience she had, saying that:

'It's really about the maturity of the relationship. So, if the relationship is becoming dependent, as it was with one of my clients and I had to give him his wings and let him fly…and tell him he could come back in time. But we weren't making any progress. I think it depends on the relationship. Whether longer term coaching is of use.'

Not all agreed about the topic of dependency being an adverse factor within a coaching relationship, however. Three of the interviewees (13.6%) opine that dependency itself is not necessarily a negative factor to be avoided. C10 offers this analogy:

'you know…I am dependent on my chiropractor!'

Separate from considering dependency as an emotional state, remuneration is depicted as another form of reliance and ethical consideration several coaches comment on. Reflecting on the early days of his coaching career, C12 raises what he describes as 'an ethical question' with some chagrin in his tone:

'There was a time early in my career when I would coach anybody on just about anything because…this is my sole source of income; I'd changed careers and I wasn't making a lot of money.'

C11 is blunt in sharing a similar experience:

'…it's a little bit difficult to say to somebody 'I think you should stop paying me because I'm not sure you need me.'

Each of these interviewees is careful and open to acknowledge the monetary realities of their coaching practice at points in time while also noting that continuing to foster a coaching engagement solely for the income is not ethical or desirable.

5.3.5 Contracting-agreements among the coach, the coachee and the organization

Sixteen of the interviewees (72.7%) use the word 'contract' directly when describing their new coaching engagements. This group of sixteen state that they provide and use contracts to detail boundaries of the engagement. Depending on the organizational situation, some are two-way contracts whilst others are three-way contracts involving the sponsoring organization as well as the coachee. Three additional coaches speak about securing an agreement with a new client for the number of sessions, months, or other blocks of time, but do not specifically speak about having a formal contract. Two of the coaches state that they work on an informal ad hoc basis and one coach is clear that he does not believe in coaching contracts.

Here are illustrative interviewee quotes from both ends of the spectrum:

'I never do professional coaching just verbally; I always have written contracts. That's for me the foundation of being a professional coach. I don't coach without a written contract.' C21

'It is left open from the beginning. I don't sign contracts with my clients, it's usually focused on a specific goal or intention.' C20

<u>Frequency of meetings</u>

Within the group of interviewees, when the mechanism used to begin an engagement is a contract, agreement, or package of sessions, then frequency and length of meetings are delineated and governed by these guidelines. Sixteen of the interviewees refer to a common reduction in the frequency of sessions after the initial contract or package is completed if the client chooses to continue being coached. Some coaches say that re-contracting took place with some of the sponsoring organizations whilst others label the agreement to continue the engagement as 'ad hoc.' The steady observation among this group is that the coach usually sets the initial frequency of coaching sessions (however, not always, sometimes the sponsoring organization sets the specifics of meetings as a condition of buying coaching) However, as the engagement progresses, meeting schedules become predicated on the client's needs. In general, the meetings become spaced further apart and in some situations, they are only set on an as-needed basis, sometimes quarterly or even semi-annually. The following comment demonstrates this point:

'Most interactions move into a different phase and that can be quite different or atypical…where it is driven by the coachee rather than a regular set of sessions.' C17

<u>Maximum coachees within the coach's roster</u>

The interviewees have a wide range of practices regarding the capacity of their coaching roster. Some so not have a pre-set formula for the number of coachees they are willing to work with at any given time and others are specific in their parameters, ranging from one to two teams at a time and up to thirty-five individual coachees. About a third of the coaches (seven) said that they do not have a maximum client load. Among this seven, two are members of coaching companies and indicate that coachee capacity is not an issue because they can distribute new engagements out to other coaches within their firm if necessary. Among the other fifteen coaches, seven have professional obligations in addition to their client load (training, teaching, seminars, workshops and so on). Each coach expresses confidence in knowing their own capacity and the ebb and flow of the meeting schedule with clients in their roster contributes to their coaches' choice of client load. C10's comment is typical when answering the question about maximum client load:

'I don't have like a formal number. It's more of an instinct of how laborious this engagement is?...So it's much more based on, it's a kind of a qualitative rather than quantitative measure.'

Termination of the coaching engagement

Eleven of the coaches (50%) say that their typical coaching engagements (referring to all engagements, both short-term and long-term) terminate at the end of the contract, agreement, or project. This fact may add confirmation for the governing importance of contracts for most of this group. When a coaching engagement continues and becomes long-term however, the coaches say that the natural end points mentioned previously often do not apply. The wisdom of knowing when to terminate working with a coachee and knowing how to do so is a skillset many of these coaches recognize the need for. Twenty-one of the coaches (one did not respond to this topic) said that in long-term engagements, the client often signals the time to end the coaching relationship by way of their actions. Recurring markers for the end point of an engagement includes: no clear goals, sessions appear to be declining in value to the coachee, quality of the sessions is devolving, client appears to not be as engaged, client does not want to change, and coaching is no longer a priority for the coachee.

However, the choice to stop working together is not shown to be the sole domain of the client. Several coaches comment on their own feelings and preferences when considering termination of a long-term engagement. A sample of such observations and reasons include: if I feel that I am not being helpful, if I am losing interest, if I begin to be bored at our meetings, and, if the relationship feels unbalanced. An illustrative explanation from C12 captures many of these considerations:

'The longer we go, the deeper it becomes. We work together as long as the challenge remains. When the challenge starts to dissipate, when they've hit a plateau where things are going well, they know it and I know it. It usually culminates in one or the other of us saying 'you know, all we've been doing the last few times is really just kinda checking in. I think it's time we took a break or ended the coaching.'

5.3.6 Client expectations of the business coach

Most organizations that teach coaching concepts emphasize the importance of the coach asking powerful questions so that solutions surface from the coachee. Standard protocol is for the coach to refrain from offering advice and all of the interviewees refer to these concepts in one form or another. A strong majority of the interviewees (92.6%) note that when coaching an executive over time, it is their experience that the coachee expects and wants input and feedback from the business coach. These coaches both directly and indirectly address their role in a long-term coaching engagement as progressing from:

'pure coaching which is that it's the client's agenda and we follow the client' combined with 'the responsibility toward edgy questions' C9

to instead being viewed as

'…a co-creation rather than necessarily believing that the client has all the answers' (C7*).*

C1 echoes the words of several of the other interviewees when she describes the manner in which she moves from coaching into other helping interventions with her clients:

'…we'll say it just like this; 'in this moment, I'm not going to do perfect coaching, I'm going to put on my consulting hat and for the issue you are dealing with, yes, I can share some best practices if that would be helpful.''

Most interviewees speak about using similar language related to telling the client that the discussion they are engaged in (or about to engage in) is not specifically coaching, but is another form of assistance such as training, consulting, using personal experiences, best practices, etc. Only three (7.33%) of the interviewees do not discuss offering advice or sharing expertise outside the coaching role at all. To be clear, it is unknown whether these three coaches do not step outside the role of doing 'perfect coaching' (C1), or if they simply did not raise the topic during our interviews. C21 was empathic in her tone when describing how her coaching role evolves whether she is offering input to her client or not:

'Yes (I evolve with my client), and not only with…I do with them, but also really ahead of them. So, I'm always making sure I'm state-of-the-art, ahead of what's going on, I'm always a pioneer.'

In a similar vein, several of the interviewees talk about how their coaching differs from what two interviewees describe as 'pure or classic coaching' as defined (their words) 'by the International Coach Federation (ICF)' (C1 and C21).

Here is C1's comment on her experience of what the business client expects:

'Executives expect some combination of executive coaching and some consulting. Sometimes they are looking for best practices. Because they get real serious business problems and for you to just

say 'well what do you think the answer is?' – you know? Like pure coaching. That is not going to cut it for Vice Presidents and C-Level people.'

In her interview C21 expands on her views of her work as a business coach:

'There is a bit of mix of teaching and mentoring and training in that as well. So, when I, for example, share with a client, knowledge…, that goes beyond coaching. My coaching is more a hybrid, it's not just coaching where I give feedback, where I (ask questions) and let the client find the answers in themselves. No, I feed my clients also with information from newest research. Which is not the definition coaching.'

Here, the comparison of what coaching is perceived to be becomes a juxtaposition of a definition taught by many coaching organizations with the day-to-day reality that business coaches experience in the field.

5.3.7 Characteristics of the long-term client

When asked to identify which situations or conditions might contribute to the longevity of a coaching relationship, 100% of the interviewees state that long-term engagements develop and occur, in part, because of the personality, temperament and demeanor of the person or team being coached. The interviewees all say that coaching assignments never begin with a preconceived goal or expectation that this new relationship will turn into a long-term situation. These coaches all state in one form or another that they flow by following the lead from the client to decide whether to continue for a longer period of time. Answering why or when a coaching engagement develops into a long-term one, the interviewees speak of traits and qualities possessed by the coachee that they believe create the potential for the relationship to continue in a productive manner. Illustrative interview excerpts include the following:

'…the nature that these people are works in progress, they have a voracious appetite for their own growth and development, and they like to be intentional about it.' C3

'Big goals, big commitments, big dreams, big challenges. Just big and complex. It's not the person who has just one problem in their life and they have to get some help to make one decision.' C21

'…there's a… passion, a commitment for on-going learning and development. And, oh, by the way, they're tending to do other developmental things at the same time.' C2

C17 succinctly portrays the thoughts of several of the interviewees with this description of both long-term coaching engagements and the clients who participate in them:

'It will always be a non-long-term arrangement unless they fit to criteria... One is that they are constantly pushing their boundaries and they always need to have a coach to be able to continue to not be an island, to do some really brave and dangerous stuff. Or, they're not very brave. And then that is a judgement of them that they have drivers which make them suitable to have a long-term relationship with a coach, without it being a dependent relationship.

C21 offers this opinion:

'…the more complex (the) coachees, the more complex their positions are, the more likely they are to be in a long-term coaching relationship.'

5.3.8 Interviewee's opinions for and against long-term coaching engagements

As a means of exploring the issue raised in section 1.2 about whether long-term coaching engagements are a good idea, each interviewee was asked if they had a personal bias for or against long-term coaching engagements. Fifteen of the twenty-two interviewees (68.2%) say that they do not have a bias either for or against long-term engagements, though all state that each situation is different. Most coaches also discuss such engagements as needing to be client centered. Further, several emphasize elements of the coach's demeanor such as ensuring that they are always still fully present, maintaining the role of being the coach, and continuing to grow and develop themselves. Illustrative comments on this topic found in the interview transcripts are:

'I think if I have a bias, it would be, whether it's short-term or long-term – if you don't want to change and work on yourself, then I don't need to waste my time, or, their time.' C4

'I don't have a bias. The way I see it, I'm willing to work with someone as long as we are both learning and growing in the process.' C13

'My bias is in favor of coaching engagements running as long as they're valuable. As long as, as a coach, I don't become complacent, that I don't become their best friend. I can use my knowledge of my clients to help nudge them, call them out, challenge them to play bigger than they think they can play. …Familiarity can be a challenge. It can either seduce us away from that or make us more valuable if we stay mindful. And so, part of my discipline as a coach is to work very hard to stay mindful with my longer-term clients. Because I can be comfort…comfort…(Chuckle)…I can be comforting, I don't want to be comfortable!' C9

Three of the interviewees say that their personal bias is against having long-term coaching engagements, but that exceptions occur which is why they themselves have coached in those situations. Explanations given for preferring short-term engagements include concerns of dependency forming on the part of either the coach or the client, of the meetings deteriorating from coaching sessions into friend-like conversations and of the coach not enjoying working with the same person over a period of time. Illustrative comments of this way of thinking are:

'What's arisen is the danger of the coach getting bored. What we've hinted at, but I'm not sure we've really explicitly said is…I think there is danger for the coachee to just fall into habit…. of showing up.' C11

'I tend to have a bias against it. I think the average person, you know, the majority of people, don't need that consistent reassurance that they've got their coach around.' C17

The remaining four interviewees say that their personal bias as a coach is in favor of having long-term coaching engagements. One coach (C19) notes that early in her career, as a new coach, she was opposed to such relationships because she had been taught during her coaching training that dependencies develop from long engagements. When long-term engagements organically developed within this coach's practice, she says that she felt some guilt and in one case, she actively encouraged the client to work with another coach. She continues by saying that with time and experience, she was able to determine for herself with confidence when a long-term engagement was appropriate and when it was not. Another coach answers the question initially by saying he has a bias against long-term coaching, however at the end of the interview, when the recorder had been turned off, he asked to turn it back on because the conversation had caused him to reflect more deeply on his position. With that reflection, he says that he enjoys transformational coaching the most and, in his opinion, that type of coaching is more applicable to and with long-term clients. These two statements provide these coaches' thoughts:

'No, I don't think I have a bias. I think I have a belief or a principle that I promote. Which is that the higher, the more professional, and the more committed people are, the longer term the coaching is likely to be.' C16

'Honestly, I guess I have a bias for them because I enjoy them more.' C12

5.4 Additional topics surfacing from the interviews

The interviews yield a rich and thick array of descriptions, reflections, and storytelling. To explore, explain and make sense of their own actions, participants openhandedly reflected on and shared personal convictions and experiences which they deemed relevant to their coaching habits, standards, and praxes. In many cases these reflections are not directly related to their process and approach in long-term coaching engagements. Topics discussed and expanded on by the interviewees include:

- Definition of exactly what coaching is (as discussed in chapter 2, a standard industry definition does not currently exist) and how coaching is/should be delivered – does it transform over the time of the engagement and if it does, is such a change appropriate within the industry understanding of what coaching is?
- Partnership and co-creation between the business coach and the client - the coach's role in their level of input, including at times advising clients versus strictly asking non-directive questions without expressing an opinion or making an observation.
- Co-creation of the coach/client relationship and the mutual learning that takes place within that relationship regardless of the duration.
- Differences and similarities in what clients expect of a coach, rather than what the coach expects of the client, again, without regard to the duration of the engagement.
- Profile of the type of individual more likely to retain a business coach long-term.
- Profile of the type of client the coach prefers to work with.
- Questioning 'who is the client?' – is it the individual being coached, or, the organization that the individual works for.
- External versus internal coaching – how the coach's position in relationship to the client's organization could affect the duration of the engagement.
- Cultural differences in conducting coaching – attitudes within organizations toward coaching relative to the country or region where the organization is based.
- Types of contracts likely to be forged depending on the company culture and differences in expectations of how the coach should function among differing types of organizations.
- The coach's business, including who pays for the coaching sessions, the organization or the individual, fee structure, and ways of marketing coaching businesses.

5.5 Discussion on the interview findings

Although the group of interviewees represents six countries, nearly three quarters of them (72.7%) are from North America. Thus, it is prudent to acknowledge that the findings from the interviews may have a cultural bias embedded within them. Though geographical cultural identity did not appear to impact on the process and approach of the coach over time for this group, it is a factor that should be acknowledged.

The themes that surfaced from the interviews and their corresponding sub-themes are discussed below in the order they were presented in section 5.3:

1. Process used by the coach
   a. Changes
   b. No change
2. Approach of the coach to the client
   a. Changes experienced and implemented
   b. No change
3. Relationship between the coach and the client
   a. Friendship
4. Ethics interviewees considered related to long-term engagements
5. Contracting – agreement among the coach, the coachee, and the organization
   a. Frequency of meetings, packages
   b. Maximum number of coachees at a time in the coach's roster
   c. Termination of the coaching engagement
6. Client expectations when working with a coach for an extended time
7. Characteristics of the long-term client as observed by the coaches
8. Bias and beliefs of interviewees regarding long-term coaching

5.5.1 Coaching processes and their application in long-term engagements

As has been acknowledged, many business coaches worldwide use a framework or codified system (process) to work within to anchor and set the foundation of the coaching engagement. The frameworks sometimes include recognized models within the coaching industry (templates for the coach to follow to guide the flow of the coaching) such as GROW, SMART, Tribal Leadership, neuroscience (NLP), Tilt 365, Appreciative Inquiry, Triatic Coaching, and also, unique models developed by the coaches themselves (Cox et al., 2014). Sixteen of the interviewees (72.7%) say that they began new coaching assignments using a defined process which some refer to as a model or system. The other six interviewees (27.3%) do not begin their new coaching engagements with a model or system but instead customize their coaching process for each client. It could be said that for these coaches, their initial process or model is 'free-style,' and some of them described their coaching process by using that term.

A noteworthy detail within this group regarding coaching process is that all the interviewees speak of moving from their beginning processes to a stance of free style or relaxed free style over an extended time with a client. If the coach employs a specific model in the beginning of the relationship, it is eventually set aside. However, elements from within the models are retained as helpful tools for the coach to use to relate back to the client due to mutual familiarity of language and concepts. If the coaching engagement is free style from the beginning, over time the 'knowing' between coach and client leads to more relaxed (though not less productive) meetings. In summary, these interviewees, when discussing their experience within their long-term coaching engagements, convert their process over time from directive (if it was) toward non-directive (Cox et al., 2014). Understanding when and how this shift occurs may be a significant factor in identifying when the learning and self-growth of the coachee reaches a tipping point in relational dyadic dynamics, leading to additional benefits for both the coachee and their organization (Meierhoefer, 2011).

5.5.2 Approach – changes coaches experienced and implemented

The relationship forged with longevity clients, appears to be a governing factor for most of the interviewees' shift in demeanor (their approach) with their longevity clients. Passmore and Lai (2019) refer to coaching as 'a professional helping relationship' (p. 69) and as such, they state that when the relationship is sound, success can occur (Passmore & Lai, 2019). Their observation is supported by the interviewees' assertion of trust and rapport which allows for the coach to be increasingly candid and straightforward over time. Once again, the coaches say that the characteristics of being forthright and frank are essential from the beginning, however it is the degree and depth of those attributes that they say change.

I have come to understand over the course of this project that within the realm of coaching, a coach's theoretical approach is a separate topic, distinct from the dynamics of the coaching relationship. Instead it has to do with the school of thought that a coach works from within, which may take the form of a practice that is psychodynamic, cognitive-behavioral, solution focused, person centered, Gestalt, existential, ontological, narrative, cognitive developmental, transpersonal, positive psychological, or that employs transactional analysis (TA) or neurolinguistic programming (NLP) (Cox et al., 2014 p. 10-11). The subject of a coach’s theoretical approach was not broached in either of the data collection instruments and is not the focus of this study. However, as shown in the findings, a few interviewees appear to know about theoretical approaches and comment about their own; two identify their theoretical approach as being ontological and one specifically describes hers as being NLP. One interviewee describes her varying approaches to coaching as choosing to use whatever theoretical approach works at the time.. Clutterbuck and Megginson (2011) call the technique of drawing on a broad range of skillsets as being *systemic eclectic* and they assert that this ability represents a high level of maturation on the part of the coach and is helpful, whatever the duration of the dyadic relationship, as discussed earlier.

Though years of coaching experience do not automatically equate to coaching maturation, the interviewees comprise a seasoned group of coaches with a collective average experience level of about eighteen years, possibly allowing for the development of a number of refined skillsets to draw from. As previously stated, their experience level may also be a factor in their involvement with longevity clients; the ICF survey conducted in 2012 concluded in its findings that more experienced coaches tended to have longer engagements (International Coach Federation, 2012).

5.5.3 Relationship between coach and client

Coaching literature identifies the attribute of a positive relationship for the coaching dyad as an important element of all coaching. As explored and discussed in section 2.3, a quality relationship between coach and client, one with encouraging emotion flowing both ways, is believed by coaching academics to be an essential component of a successful coaching outcome. As de Haan (2008a) observed ‘It is hard to overestimate the importance of the relationship between coach and coachee’ (p. 532). Supporting this observation, studies have reported that early positive emotional reactions are a potential marker for long-term adherence to an intervention (Clancy & Binkert, 2017; Cohn & Fredrickson, 2010). Thus, it is not surprising that each of the interviewees speak about the coaching relationships as being an important factor in working with their longevity clients.

Applying her learnings and research to the growth of the coaching relationship, Wasylyshyn (2014) writes about the ‘alchemy of the leader/coach relationship’ (p. 127) and postulates that within many long-term coaching engagements, the role of the coach alters over time from that of being a coach to that of becoming a trusted advisor. The fact that senior leaders often need a safe place to be with someone who understands their world is among the reasons provided for this shift.

Friendship

When the subject of friendship was raised in the interviews, coaches had a range of reactions as previously presented in the findings. All participants who comment on this subject are firm in their conviction that a coaching relationship and friendship should not exist together at the same time. Some of the interviewees, however, are not opposed to forming a friendship with their clients if there is a mutual agreement regarding the boundaries between them (and some have created those forms of relationship). However, Rogers (2016) seems to have captured the sentiment of many of the coaches when she wrote that ‘friendship is a coach-free zone’ (p. 61).

5.5.4 Ethics related to long-term engagements

It is not surprising that 100% of interviewees discuss ethics related to working with long-term clients. There is general agreement in the coaching community that coaches have a moral responsibility to operate with keen self-awareness and integrity (Stout-Rostron, 2014) at all times when working with a client, unrelated to the duration of the engagement. Such responsibility includes the ability of a coach to recognize ethical coaching dilemmas and respond appropriately (de Jong, 2010). The collective statements of this group appear to indicate that these coaches are aware of their responsibilities to their client and to themselves when coaching.

As discussed in section 3.9, business ethics are often concerned with the legality of actions rather than the values which may underpin them (Bucaro, 2004). Coaches who work in the world of business, of course, need to know and understand these ethical subtleties. It is necessary to understand and at the same time be able to separate from what informs one’s own values and to know which, if any, coaching code of conduct should be chosen at any given time (Diochon & Nizet, 2015; Horner, 2005). The diversity of the coaches' backgrounds, including culture and training reinforces the fact that values are not a one-size-fits-all proposition, rendering application of even the most specific ethical codes open to differing interpretations (Passmore et al., 2017). Coaches worldwide are being encouraged to turn to the ethical codes of coaching organizations in order to unify ethical standards and industry expectations. Even when access to such guidance is made available to practitioners, it is incumbent upon each coach to develop the ability to practice self-reflection and self-regulation (Sheth & Sobel, 2000; Turner & Passmore, 2018).

Both the qualities of self-reflection and self-regulation were demonstrated (presented earlier in this chapter) by interviewees C20, C14, C11, and C12 who openly recount ethical dilemmas each faced while relating situations that arose during engagements with their long-term clients. C20 experienced the situation that Peterson (2011) cautions against which is when a coach reaches the point of valuing the relationship to the extent that they become reluctant to challenge the client. Coaches C6, C11, and C12 demonstrated both self-knowledge and reflection in recounting their experiences of having the temptation to give in to not maintaining a position of being intellectually, emotionally, and financially independent (Sheth & Sobel, 2000) in their roles as helping professionals. Coaches C11 and C12 acknowledge monetary considerations that tempted each of them to prolong coaching relationships. The coaches' needs, monetary and otherwise have been raised as an aspect of coaching that has the potential to create a conflict of interest for the coach and must be guarded against (Cox, 2010; Maccoby, 2009).

Each of these four coaches state that the ethical dilemmas they describe occurred early in their careers and that such predicaments would not be issues for them today as their ethics and values are now firmly embedded in their approach. The reflection of these coaches fits well with Diochon and Nizet's (2015) research that led them to conclude that for a coach, ethics are tied to the time and place of their evolving journey; that these ethics are contextual to the coach's maturity and the development of their moral character.

5.5.5 Contracting: agreement among the coach, the coachee and the organization

The findings show that the decision on how to proceed is in great measure predicated on the coach's arrangement with the organization (if one is involved), and/or, with verbal agreements between coach and client after the initial contract has run its course. The majority of interviewees describe outcomes involving the use of contracts which is consistent with the literature analyzed in this dissertation (Turner & Passmore 2018). Though as established earlier, not all coaches choose to use contracts. We have seen that the process and approach of many coaches changes over time with the longevity of the engagement, and contracting is an aspect of both. Perhaps worthy of further research is this question: When the initial structure of the coaching dyad includes an explicit contract, if it is not formally renewed what is the implicit contract that the coach and client move forward with?

Given the prevalence of the use of contracts in business coaching engagements, it makes sense that components of coach contracting have been and continue to be researched. This scholarly activity could cover the role that contracts may play in aligning a sense of purpose between coach and client as well as understanding it as a measurement of outcomes.

Dingman (2004) conducted a survey on the effect of executive coaching on certain variables from the perspective of both the coach and the client. She explores these variables using a framework of six components that she hypothesizes make up the coaching engagement, beginning with the importance of the contract and its structure. It should be noted that to date, there is not an agreed set of components or series of stages for a coaching framework, including the contracting step. For example, Liljenstrand and Nebeker (2008) suggest a different coaching model comprised of seven stages, the first encompassing both the contract and establishment of the coaching alliance. O'Neill offers a template of four stages of executive coaching, the first being contracting (O'Neill, 2007). Lee (2013) states that contracting should be a central component of executive coaching to ensure clarity and to provide base expectations which can then be the foundation of a productive coaching relationship.

Bresser and Wilson (2010) are strong in their view concerning the importance of the coaching contract stating that it is ‘the fundamental basis for a good coaching relationship’ (p. 11). Taking a similar stance, the 2013 Ridler Report (Ridler Report and EMCC UK, 2013), explores significant trends in executive coaching within organizations. A segment of the report is devoted to the specifics of contracting arrangements used by coaches and organizations stating that the contract is the ‘core mechanism’ (p.11) to ensure professional boundaries and expectations among the coach, the client, and the sponsoring organization.

When conducting a review of the literature on this subject, Lee (2013) describes the myriad form of coaching contracts as: ‘Methods for establishing productive expectations among the multiple parties involved in an executive coaching engagement ‘(p. 40). In a report on transformational coaching Wellbelove (2016) recommends that within the conversations prior to contracting, coaches should communicate clarity on the differences between performance and developmental coaching to more effectively be able to measure outcomes. Wellbelove also recommends that the contract provide clear boundaries and expectations related to the coach’s feedback to the client, encouraging the coach to re-contract as deemed necessary to work toward a successful outcome. This last recommendation addresses the subject of client expectations as discussed in section 5.5.6.

Delving into the structure of the coaching contract in their 2017 survey, Passmore et al. explores several aspects of the elements to be included as well as the typical parties involved in executing the contracts. The following year, Athanasopoulou and Dopson (2018) conducted a review on executive coaching outcomes, in which they considered how the contracting process, and the content of the contract itself contributes to a successful result. Though nearly ninety percent (86.4%) of the interviewees work with contracts at the beginning of their coaching engagements, most of them also shift away from the use of formal written agreements when involved in long-term engagements. Yet, it is clear that the literature indicates that contracts play a vital role for all parties involved in a coaching engagement. These points raise a salient question, which is if a refined form of contracting should be explored and offered for practitioners who work with longevity clients? An equally valid question to consider is whether in long-term coaching engagements, is the relationship the contract? We know from the interviewees’ experiences that a deep trust develops between coach and client in long-term engagements. Lee (2013) defines contracting as all agreements that are made spanning official to casual and documented to verbal statements, giving extra weight to the possibility of arguing that trust (the relationship) is a form of transparent contract.

Frequency of meetings, and the use of packages or sets

Some of the interviewees prefer to sell their services in packages or sets, that is, blocks of time, or a number of hours retained to be used within a specified period. How and when this banked time is utilized is a decision to be made mutually between coach and client (McMahon, 2019).

The literature reviewed does not appear to provide a best practice recommendation for how often coaching meetings should take place or how long each session should last. Each interviewee approached these parameters using the cadence of session structure that worked best for them and their process (weekly, three hours per month, every other week, and so on). A 2008 survey (Liljenstrand & Nebeker, 2008) correlated the tendencies of session frequency and length to the academic and professional background of the coach. However, the interviewees in this study opine that when the engagement moves into long-term status, the frequency and length of meetings often become governed by the desires and needs of the client. A possible consideration for future research would be the association of coaches' backgrounds to the incidence and frequency format of long-term engagements, perhaps being able to predict their probability.

Maximum number of clients in a coach's roster

Though the coaching literature has much to say on both theory and practice for the typical duration of coaching engagements (see section 2.6), there is silence in relation to what constitutes a full client load for a business coach. Marketing firms often approach coaches with offers to secure leads or assignments for them, however little to nothing is said about how many clients is enough. Noting that the practice of coaching is a unique intervention with every client (Grover & Furnham, 2016; Rogers, 2016) and that each coach approaches their craft differently, there does not appear to be a formula to follow and perhaps there is no need for such a measure. Indeed, most of the interviewees stress that although they have in mind a maximum capacity, each works to ensure that they balanced their own needs with the needs of the clients they serve. Overall, this topic was a non-issue for this group, perhaps because each is experienced enough within their business to instinctively work within their limits.

Termination of the coaching engagement

Typical termination of coaching engagements is a relatively straight-forward event, often occurring as a function of completing the contract, agreement, package of hours, or organizational project according to the interviewees. However, in long-term engagements, ending the formal coaching relationship usually does not have such a built-in mechanism to guide the coach or the client. Half of the interviewees stated that for most of their coaching clients, the engagement is complete when the agreement is complete. In long-term coaching dyads however, such agreements for a planned ending are sometimes non-existent. The findings in 5.3.5 indicate that the coach most often signals the ending of a long-term coaching relationship based on what is being observed in the client's behavior and experienced within the coach's own feelings and perceptions.

This vagueness of boundaries around the completion of the coaching engagement may place both more responsibility and more (perhaps) inappropriate power in the hands of the coach than is desired. Cox (2010) contends that a readiness to end an engagement is an aspect of coaching to consider jointly with the client. She suggests that the ending should be considered and allowed for in the contracting stage, though not necessarily by stipulating a specific number of sessions. There is some meeting of the minds in the relevant literature on this point. When discussing solution-focused coaching, Cavanagh and Grant (2014) believe that contracting for a specific number of sessions is not consistent with working through to the goals of the client because the timing to do so is unknown and it is the client who knows when they feel complete (Cavanagh & Grant, 2014, p. 58). The fact that this group of interviewees often moves to a free-form arrangement with their client leaves the subject of a successful termination of the relationship open to happenstance. Brennan and Wildflower (2014) assert that ethically it is the responsibility of the coach to bring a coaching relationship to a close as needed. The interviewees appear to agree to some degree with both of these stances, stating that the signals from the client are often the trigger for the coach to suggest ending the engagement. Further exploration and guidance on this specific aspect of the coaching process may be of great service to practitioners working with longevity clients who are often no longer guided by terms of a contract or a particular coaching model.

5.5.6 Client expectations when working with a coach for an extended time

As discussed in section 5.3.5, contracting whether written or verbal, often details the expectations between coach and client for multiple facets of their work together (Lee, 2013; Turner & Passmore, 2018). These details may include transactional specifics such as frequency and length of sessions, reporting protocol between the coach and the organization, issues to be addressed within the coaching meetings, confidentiality guidelines, ethical boundaries, supervision boundaries if the coach works with a coaching supervisor, and so on. Coaching contracts do not typically cover the details of how a coach will 'coach,' including listing the stipulation of whether advice will be offered or not. Most of those interviewed for this project move beyond such negotiated agreements with their long-term clients as has been discussed.

What is commonly taught in many coach training organizations is not the only viewpoint proffered by those who are a part of and study the coaching industry. As example, Peterson (2011) believes that an attribute of a successful coach is the ability to offer an 'external, independent objective perspective' to the client (p. 88), and Wasylyshyn (2014) writes that a component of her value as an executive coach is her ability to provide objective feedback.

Virtually all the interviewees are comfortable in their decisions to take an adaptive coaching approach to working with their clients by remaining flexible. They are confident that the are able to do what is in the best interest of the client, including offering feedback, providing an independent perspective, and giving advice as deemed appropriate (Peterson, 2011; Sheth & Sobel, 2000).

5.5.7 Characteristics of the long-term client as experienced by the coaches

Each interviewee was asked 'Would you say that there is a 'type' of coachee, or a situation, which allows/causes the engagement to continue and become long-term?' (see Appendix E for the interview guide). Several of the interviewees comment on characteristics they view as common among longevity coachees including complexity of the individual along with a desire for learning and self-development. Complexity of the coachee could be said to include characteristics such as feedback receptivity, developmental self-efficacy and goal orientation. Each of these areas is recognized as significant predictors of coaching effectiveness, irrespective of the length of the engagement (Bozer et al., 2013). There may be a synergy between such characteristics and long-term engagements that bears exploration. For instance, when coaching appears to be stimulating growth within the client, does the engagement tend to continue? Do client personality characteristics described by the interviewees and Bozer et al. (2013) serve as markers for clients who want/need extended coaching or perhaps as an indicator of a receptive coaching client in general? Is there a personality assessment that could assist the coach in knowing whether a new client exhibits traits indicating a tendency to lead to a long-term relationship?

Answers to these and other questions may serve coaches and clients working together from the beginning of an engagement. Bennett (2006) suggests that a topic of future research should be the characteristics of an effective coaching engagement. To date, there has been limited and inconclusive research on the correlation of client personality to coaching success (Bozer et al., 2013; Stewart et al., 2008) and no research correlating client personality to long-term coaching, demonstrating the potential for future study.

5.5.8 Bias and beliefs of interviewees regarding long-term coaching

The unified and firm opinion among all the interviewees is that each coaching engagement is distinctive, and that the duration of an engagement will always be predicated on the needs of the client combined with budget and time constraints of the sponsoring organization, if involved. Though all have served longevity clients, three of the interviewees say that they have a bias against long-term engagements. Despite this bias, they each comment that there are times when exceptions are in the best interest of the client and thus they have successfully experienced working to this different timescale. Four coaches had a bias toward facilitating long-term engagements, again with the caveat that such an arrangement must be in the best interest of the client. The remaining fifteen interviewees said that they were neutral, also pointing out that this is because it best serves the client. Executive coach David Goldsmith (2018) has a similar neutral stance to long-term engagements, noting both a caution and a coaching reality: ‘Creating dependency is not ethical but timing (length of engagement) cannot be predicted. There’s (sometimes) not only a six-month supply of stuff to work on’ (Goldsmith, 2018).

All interviewees take the stance that they do not begin a coaching assignment with either the thought or expectation that the duration of the engagement will become long-term. Overall consensus in the literature places the typical duration of a coaching engagement at between four to six months, however the range for ‘typical’ spans from under ninety days to eighteen months (American Management Association, 2002; Berglas, 2002; Corbett, 2015; Council Perspectives, 2008; de Haan et al., 2016; Stewart, 2011). The literature also notes and acknowledges many exceptions to these timeframes based on client need and, the level of executive seniority (McKee, 2018).

These interviewees appear to have become comfortable with varying coaching assignment durations. The average coaching tenure for this group is nearly eighteen years rendering them seasoned practitioners. There is an over-arching theme of being in service to the client and putting personal preferences aside, including for the three coaches who state that they are biased against long-term engagements. Perhaps many in this group have achieved the stage of coaching that Clutterbuck and Megginson (2011) describe as systemic eclectic, a state representing coach maturity.

Chapter 6 Summary and discussion of the combined data from the survey and the interviews (data presented in chapters 4 and 5)

6.1 Introduction

This research is designed to consider the process and approach of coaches in long-term engagements. A wide breadth of data was organically gathered in the process of seeking this information. This ancillary data is not the focus of this project and analysis of data collected from both instruments has been confined to the question explored. It must be acknowledged that this narrow analysis may impact the generalizability of the overall data (Gray, 2014). For example, sources of data collected span the globe, possibly introducing cultural differences which are not explored here. That being noted, a considerable amount of data emanated from the United States and in lesser amounts from Canada and the United Kingdom. This regionally concentrated information could perhaps be analyzed in future research to explore various coaching contexts separate from process and approach.

The mixed-method approach to data compilation employed in this study has allowed me to triangulate the literature with the data collection methods as a means of strengthening and confirming their outcomes (Briller et al., 2008). Results from both methodological tools implemented in this research (survey and interviews) yielded similar coach profiles and themes while both of the analytical methods used, statistical and interpretive, provide contextualization for one another (Schwandt, 2015). In this chapter, the data from each collection method related to the question is compared and contrasted where relevant. The survey provides a summary overview of coaches' practices and beliefs and so therefore provides a good backdrop to the interviews, which gives in-depth looks at the actual experiences and praxes of coaches who work within long-term engagements. This methodological triangulation allows for some of the data to be confirmed (Briller, et al., 2008), thus adding to the reliability of the study.

6.2 Participant demographic comparisons: survey and interviews

There is an identifiable similarity in participant profiles between the survey and the interviews even though nearly a third (31.8%) of the interviewees are volunteer respondents who did not participate in the survey (sections 4.2 and 5.2). The preponderance of participants taking part in both methods are external coaches (survey-87%, interviews-91%) and the vast majority are veteran practitioners (survey-76% of respondents have 6-20 years' experience, interviewees average 17.9 years' experience). Each group is collectively well experienced in working with longevity clients (survey results show an average of five years, interviewees have an average of seven and a half years). Both assessments provided input from divergent areas of the world: survey respondents represent thirty-two countries and interviewees represent six countries. The majority of all participants are, however from three countries: The United States (survey-44%, interviews-54%), Canada (survey-12%, interviews-18%) and the United Kingdom (survey-10%, interviews-9%).

6.3 Variances between the data collected from the survey and the interviews

There are differences within some of the results of each data collection tool. It is possible that this is due to the nature of answering written questions versus flowing conversation. Whatever the reason, some of the data collected, while interesting in its own right, cannot be compared between the two instruments.

For example, in the survey about one in four respondents explicitly list contracting as a component of beginning a new engagement while nearly three quarters of the interviewees referred to contracting as a regular component of onboarding a client. It is unknown if more survey respondents use contracting than those who explicitly commented on the topic. De Haan et al discuss the importance of contracting for a 'qualified coach' (de Haan et al, 2013 p. 41) and Lee (2013) asserts that a contract is a component of a good coaching outcome. Most of the interviewees appear to share these perspectives given that nearly three quarters of them discussed their own contracting activities. If a direct question had been asked about contracting within the survey, it is possible that a higher percentage of respondents would have affirmed their usage. Conversely, no perspective fits all as at least one interviewee eschews the use of contracts and the possibility exists that some of the survey respondents do as well (findings are presented and discussed in sections 4.5.1, 4.6, 4.6.1, 5.3.5, 5.5.5, and 5.5.6).

Another identified difference is that the theme of client expectations in a business setting is prominent within the interviews but did not surface in the survey. As discussed in section 5.5.6, the interviewees are each clear on two of their understandings about this topic: that standard coaching is supportive and non-directive (Blakey & Day, 2012) and yet the reality of their experiences is that at times, clients want directive challenge and sometimes input in the form of opinions, ideas, and best practices. Though the focus of the conversations was on long-term engagements, it should be noted that the interviewees did not specifically attribute this expectation to longevity clients, but to the reality they have experienced when working within the business world. Further, as with the topic of contracts discussed earlier, it is unknown if survey participants would have offered opinions about client expectations if the topic had been specified.

On the topic of client characteristics, some of the interview participants did discuss and differentiate goals and objectives of their short-term and typical clients versus their longevity clients (sections 5.3.7 and 5.5.7) though this topic was not raised by survey participants. Findings regarding other client characteristics common to both instruments are discussed in section 6.4.

6.4 Themes common to both the survey and the interviews

Themes identified in each data collection instrument have been explored in detail separately in chapters 4 and 5. Evaluation of the data revealed several themes common to both data collection instruments. The similarity of experience and conviction shared by participants within each of these key areas are highlighted in the following thematic breakdown:

- Process practiced by the coach: model, system, or method, along with contracting, frequency of sessions and change (or lack thereof)
- Approach of the coach: how they interface with the client
- Relationships: their development and progression
- Ethics related to long-term engagements: cautions and concerns
- Client characteristics: identifying who is more likely to be a long-term client
- Practitioners' reflections: on their own growth and beliefs

.6.4.1 Process

The ‘coaching process’ is the framework each coach works within and can be comprised of several elements. A non-exhaustive list includes: the model used (often referred to as a ‘process’), contracting, intake, assessments, meeting lengths, schedule and frequency of meetings, duration of engagement and how the engagement comes to an end (Passmore and Fillery-Travis, 2011). None of these components appear to be utilized by all participants in this study. Yet, taken as a whole, every participant indicates changes to some of these elements when working with longevity clients over time. Perhaps this fact supports Cavanaugh’s (2013) contention that coaches have a core challenge to create new paradigms and evolve processes in today’s ever-changing environment and that linear models of coaching eventually fall short of this challenge. He suggests that nuanced adjustments to planned models of engagement in coaching are essential to adequately address types of action needed. He also posits that though achievement of a goal may be a starting point, often the concept of purpose becomes a clearer objective, leading to iterations of initial processes used by the coach (Cavanaugh, 2013). Another study (de Haan, et al., 2011) concluded that the various elements in a relationship are more important than specific coaching techniques (processes) and interventions. This observation fits well with the literature discussed in section 2.4 which identifies the coaching relationship as a governing factor for success.

Further affirmation of these concepts within the data is that many coaches assert that they rely on their own intuition to successfully move through a coaching engagement. Collectively, these coaches not only function within a myriad of coaching models worldwide but adjust those systems as they deem beneficial. Such fluidity of functioning supports the observation of many scholars that the activity of coaching is comprised of an applied field of practice derived from various helping disciplines melded to form a unique intervention (Brock, 2012; Cox et al, 2014; Hicks, 2017) (section 2.3). Examples within the data include comments in the survey about shifts in delivery within a model over time and discussions by the interviewees of expanded coaching toolkits (chapters 4 and 5).

6.4.2 Approach

Nearly all respondents from both data collection instruments note changes in their own approach when it comes to their longevity clients. Common descriptors offered by the respondents for these changes include: more fluid, less formal, more direct candidness, flexibility, deeper, more relevant questions. The element identified repeatedly as being most responsible for this change in approach is the development and deepening of the relationship between coach and client over time. These beliefs of the participants are well supported by the literature regarding relationships (see section 2.4).

Henriques et al conducted a study which concluded that the development of the quality of the relationship between coach and client occurs through a 'long-run approach' (Henriques, et al., 2017, p. 75). They state that performance goals should be viewed as being short-run outcomes which they conclude are better supported by less warmth and more challenge from the coach. In contrast, they posit that to produce long-run results for the client, warmth between the dyad must be developed. This progression of coaching approach from that of being more formal and behavior oriented to having more flexibility and depth is borne out by the experiences of the coaches in this study as described earlier.

Henriques et al's work (2017) may provide an explanation for the wide range of coaching engagement durations proffered in the literature and discussed in section 2.6. Different timeframes for different needs. Meierhoefer's conclusions (2011) also support the concept of the type of goals addressed being tied to the length of an engagement, stating that over time, long-term dyads transition their approach from an orientation of focusing on specific issues to one of focusing on the whole person which encompasses more than behavioral goals (p. 131).

6.4.3 Relationship

Reviewing the literature, it is no surprise that the near universal experience among all the participants is that the relationship that develops within the long-term dyad is the governing factor for the client's goals and growth as well as the growth of the coach (discussed in section 6.4.6). There is agreement among the participants that the relationship, as it deepens, has an impact on the essence (not just mechanics, but also depth and intensity) of the coaching process and the coach's approach in response to both the client and the initial process that was used. Over time, the dynamics often move from a coach-led interaction to mutual sense making which emanates from a deepening trust (Meierhoefer, 2011). As discussed in section 2.4 and throughout this document, the literature amply recognizes the quality of the coaching relationship as a crucial benchmark in ensuring successful coaching outcomes (Bachkirova & Borrington, 2018; Baron & Morin, 2009; de Haan, 2008; de Haan & Duckworth, 2012; Evered & Selman, 1989; Jarvis et al., 2006; Kampa,-Kokesch & Anderson, 2001; Passmore & Fillery-Travis, 2011; Rogers, 2016; Stout-Rostron, 2014). Responses gathered in this research recognize that the importance of the coaching relationship applies to all coaching interactions and that this crucial factor is not just limited to long-term engagements. Participants from both data collection instruments in this study report that it is the shared continued growth of both parties and the trust developed between them that allows for the depth of bonding over time and it is this aspect of development that affects the coach's approach and process.

Many of the participants state that these alliances frequently shift from the traditional role of a coach which is providing a supportive and non-directive service to the client toward a less traditional coaching role of providing input of knowledge and judgement (Blakey & Day, 2012; Charan, 2009). Their experiences are upheld by Wellbelove (2016) who has identified 'the changing role of the coach from reflective mirror to true partner' (p. 38) as an aspect of the evolution of the role of coaching. Also addressing relational alliances, Wasylyshyn (2014) asserts that the coaching process when working with executives is more relational than transactional and as such, can hold value with this type of client for a number of years. In such situations, the relationship is not one of dependency, but rather a natural evolution of the coaching process from one of 'pure coaching' to one of being a partner and advisor. Wasylyshyn (2014) states that such a relational shift warrants the attention of the coaching community as part of the commitment of coaching to truly serve clients rather than simply serving a format. She recommends that more coaching practitioners respond proactively to developments in the marketplace and consider learning how to transition from coach to trusted advisor (her phrase) as warranted for some of their clients.

De Haan (2008) makes a similar observation, stating that the evolution of the coaching dyad relationship means that it moves toward one of being a partnership between professionals. The findings from this study are consistent with and reinforce these observations in the literature.

Both groups of respondents were varied in their beliefs (sections 4.5 and 5.3.3) on the topic of forming or maintaining a friendship with a client while actively coaching them. The factor that did not vary among them was a conviction of adherence to coaching standards while coaching regardless of the length of the relationship and the changes in coaching approach (6.4.2) it may have evoked.

6.4.4 Ethics

All participants in this study have practical hands-on experience with the phenomenon of longevity business coaching. From the vantage point of their experience, the majority echo many of the cautions stated within the literature when considering the expanding role of a coach in a business setting. Turning to participant examples, a coach may attempt to retain a client engagement for personal economic reasons, or strive to become a ‘speaking partner’ with the client without having the proper background or mindset to do so (Maccoby, 2009, p. 30). The literature also cautions against a coach becoming too close with a client and inappropriately using the relationship to gain authority and power (Berglas, 2002; Blakey & Day, 2012). Both the literature and the data appear to confirm the participants’ concerns and taken together, they become a compelling reason for professional coaching bodies to continue identifying and articulating specific ethical competencies which can serve as guidelines for those developing and offering training and coursework on expanding coaching roles in a business setting and additionally, specifically within long-term coaching engagements.

Many of the contributors to the survey and the interviews were forthcoming in sharing their concerns and even their failures within their long-term engagements (sections 4.6 and 5.3.4). Perhaps because so many of these coaches have been practicing for over a decade, they have had the ‘time in the trenches’ to have experienced their own motives and values being tested and honed. Even so, these coaches do not see themselves as immune to the many subtleties which can constitute an erosion of ethical conduct as evidenced by their on-going attention to the topic. Also, whilst some coaches referred to coaching codes and standards they are familiar with and endeavor to adhere to (from coaching associations and training schools), the overall stance is that each must monitor their own actions through vigilance and self-reflection to ensure continued ethical conduct. This belief is consistent with Diochon and Nizet's (2015) assertion that ethical codes do not and cannot fit all situations and thus cannot replace personal reflectivity. It also supports de Jong's (2010) conviction that a coach is accountable and responsible to protect the interests of the client. He states that values, principle and character are actually more important to the coaching process than is coach training and certification though he does not consider coach training to be unimportant (de Jong, 2010 p. 204).

Literature confirms that the activity of coaching carries a moral responsibility on the part of the coach to not only act with integrity, but to be able to identify and act on ethical issues as they arise (de Jong, 2010; Peltier, 2001; Stout-Rostron, 2014). This responsibility takes many forms for coaches, supporting Diochon and Nizet's (2015) observation that a coach's ethical standards are tied inextricably to their own journey in experience and personal maturity. That maturity includes a refined ability for self-reflection which is acted upon through the application of practical wisdom and good judgment, in other words, the attribute of phronesis (Gibbs et al, 2007 p. 366).

Wasylyshyn (2014) summed up the attributes required for a successful and mutually ethical coaching relationship as being traction, trust and truth telling, again reinforcing the importance of coaching maturity and standards Understanding and ongoing commitment to ethical concepts and self-reflexivity by the participants is evident in action via the stories of the interviewees as they candidly recounted their ethical learnings (sections 5.3.4 and 5.5.4) and by the fact that virtually every interviewee raised the topic during our conversations. Similar candor around this issue was shown by survey respondents through the frankness of the comments provided throughout, particularly when gauging and commenting on the Likert scale (sections 4.5 and 4.5.1). Given the coaching tenure of both sets of respondents, perhaps this stance of self-honesty is a reflection of Gordon's (2017) assertion that when a coach is operating at full coaching maturity, they are able to question and assess their own activities, noting how far they've come, yet remaining mindful that the journey is ever expanding.

The topic of ethics is ubiquitous in the coaching industry, as evidenced by the publications and websites from various coaching professional bodies and frequently addressed by nearly all professional coaching organizations. The importance of this subject is reinforced by the fact that the seasoned practitioners who contributed to this study appear to be vigilantly mindful of their obligations as a business coach to monitor and self-regulate their own ethics and values related to their work as a coach (Cavanagh & Grant, 2014).

6.4.5 Longevity client characteristics and growth

There has been much discussion in the literature on the topic of 'why' a person is being coached, such as behavioral issues, transformative, developmental work and transitional situations (Dingman, 2004; Peterson, 2011; Stewart et al, 2008; Wellbelove, 2016). However, to date, none of the literature has directly focused on client character traits in relation to the length of an engagement. There has been research and discussion of client traits that may contribute to a successful coaching outcome, however, again, not considering long-term engagements as a factor (Bozer, 2013; de Haan et al, 2013; Stewart et al, 2008).

Many coaches from both the surveys and the interviews comment on the personality traits of a longevity client versus the clients within the rest of their portfolio. Descriptors given for this type of client include 'self-aware,' 'complex,' 'embracing the process,' 'ready to do the hard work' 'and self-driven.' Some of these same descriptors have been applied to matching coachee characteristics to successful coaching outcomes (Bozer, 2013; Stewart et al, 2008). It may prove to be helpful to the coaching community to explore not only which client characteristics contribute to successful coaching but also which of them may be indicators of individuals who could be candidates for long-term coaching. Other factors related to the longevity coaching client which perhaps could prove predictive to the likelihood of long-term engagements are the types of professional positions (titles) held by longevity clients and the rank of those clients within their organizations.

An overarching sentiment among the members of the two data collection groups is that long-term engagements offer the opportunity for a different, richer type of development and growth for all the parties involved. In lockstep with the advantages in such relationships, there is a strong caution from these responders that the coach must be committed to their own values and ethics, in concert with and buttressed by the needs and desires of the client.

6.4.6 Development of the coach – reflections from the data

Many of the respondents in both data collection instruments refer to their own personal and professional development along with the growth and development of both themselves and their client throughout the relationship. Further, numerous participants in this study characterize themselves as life-long learners. A quote from a survey respondent followed by a quote from an interviewee provides illustration of this shared viewpoint:

'Both I and (the)coachee evolve over time. I learn and expand as I go and so do they. (Comment Q5)
'I'm always making sure I'm state-of-the-art, ahead of what's going on, I'm always a pioneer.' (C21)

Self -reflection and an on-going commitment to monitoring and sharpening their professional skills is a recurring topic among the responders in both data sets, each group raising the topics implicitly and explicitly. An example of this commitment is demonstrated by the interviewees when answering the question about whether they had a bias regarding long-term coaching (section 5.3.8) Whilst some preferred it and some believed that such engagements should be an exception to the rule, most commented on what they viewed as two necessary conditions to long-term engagements; that the engagement continues to be useful to the client and the organization and that the coach continues to practice vigilance in monitoring their demeanor and presence throughout the relationship.

It may be instructional to note that whilst these coaches refer to self-monitoring and presence when coaching, none explicitly described how they achieved that state and how they continue to grow as a coach. There are implicit inferences offered which may address this topic. For example, eighty-eight percent (88%) of survey respondents belong to one or more professional coaching associations and most of these require annual continuing education as a condition of membership, and also in some cases, as a condition of maintaining certification (ICF, 2020; WABC, 2013). References from the participants to reading, conferences, supervision and other forms of self-improvement are touched on. As suggested in section 7.4, business coaches with long-term clients might be well-served by having access to material designed to address their specific situations.

Clutterbuck and Megginson (2011) describe levels of maturity (coaching mastery) achieved by seasoned coaches, using the term systemic eclectic to describe a level of coaching expertise and self-actualization that they attribute to highly effective coaches who have the ability to switch between different approaches and schools of thought as required. Noting that a progression of proficiency beyond the basics is not needed to be a 'good' coach, Peterson (2011), like Clutterbuck and Megginson, distinguishes among levels of coaching competence and states that such maturity is an essential factor to become a really great coach. Peterson goes on to note that the 'coachability' of a client is often related to the skills of the coach rather than the amenability or other factors relating to the coachee (2011, p.87). Again, this thinking demonstrates different possibilities open to the coach that appear to be dependent on levels of expertise. Finally, the terms 'expertise' and mastery are not synonymous with 'coaching certification,' but with the entirety of the background, training, and experiences of the individual coach (Shybrow & Wildflower, 2011).

Though both coaching scholars and professional organizations have been working toward defining the stages of coaching competence, standardized industry definitions as well identified standardized mastery within specific coaching dynamics remains largely undeveloped. Many have been working toward outlining and homogenizing the stages of coaching competence (Passmore & Fillery-Travis, 2011). To date, these topics are still in the development and exploration stage (Peterson, 2011).   Much like the industry itself, this is an area that is still in the exploration stage (Athanasopoulou & Dopson, 2018). Thoughts and suggestions related to long-term coaching support are offered in section 7.4.

Chapter 7 Conclusions and Recommendations

7.1 The 'Easter Egg' within this study

Similar to the 'Easter egg' bonuses sometimes embedded in computer games and movies (UrbanDictionary, 2004), an additional 'finding' from this study that is of significance to the coaching industry has been undisputedly confirmed by the evidence found in the data, which is that long-term business coaching engagements are not an anomaly. These types of coaching relationships are prevalent enough within the industry that within this one study, over 200 coaches from thirty-two countries (although about 43% of this group was from the United States) identify themselves as either currently or previously working with longevity clients. With this now documented finding, it is reasonable to deduce that these types of engagements are not outliers to the range of business coaching services offered globally. They are an organic development within many business coaching dyads that occur regularly throughout the world, rather than being an occasional happenstance as was described as a possibility in section 1.2. The evidence for this finding is that 204 survey respondents met the fairly rigorous requirement set within this research of having coached the same client for at least two years. Long-term coaching engagements are now an identified portion of the range of approaches that coaches can and do offer clients. More than this, most of the participants in this study state that they are comfortable enough to actively maintain such coaching arrangements when, and in the way, they deem suitable.

This finding has been amply demonstrated within both the survey and interview data sets. It is interesting to note that respondent coaches in this study were also clear that they did not plan for or seek out longevity clients, rather, the engagement seemed to have evolved and/or adapted as a progression of the coaching relationship. This study documents that when the choice to continue to work with a client for an extended time is deemed to be in their service, many coaches embrace such engagements. Although this finding was not the aim of this study, it is one of the clear results and has the potential of tangibly affecting how coaches, teaching institutions and associations view and address this now documented form of coaching. I believe that the implications of this finding for the coaching industry cannot be ignored. This evidence gathered from both the survey and the interviews has surfaced several areas of coaching research that are in need of exploration for the benefit of the coaching community. Such research recommendations are presented later in this chapter.

7.2 Answering the research question

This research has been undertaken to answer this question: 'What is the effect of long-term coaching engagements on the business coach's process and approach?' The desired outcome was to determine the impact on the coach's work when the coach and client work together in a coaching relationship over an extended period. The answer identified from the data is that both process and approach are often affected by the dynamics of being in a long-term engagement. Data collected from both the survey and the interviews (presented in chapters 4 and 5) show that for those business coaches who work with a client for an extended period of time, whether continuously or intermittently, the longevity of the engagement often affects both their form of coaching (process) and their way of viewing and interacting with the client (approach).

What exactly *are* the is the impacts that this form of coaching has? The participants in this study state that there are many and these have been described in chapters 4 and 5. Regarding process, almost two-thirds of the survey respondents and all of the interviewees believe that their way of delivering coaching to their long-term clients is different from their coaching delivered to their other clients. Though some respondents state that they always maintain certain aspects of the coaching structure regardless of longevity (as example, model or method may not change), all identified facets of their coaching process that are altered during longevity client relationships. Elements that often shift or evolve include the model or framework used, the structure of the contracts between coach and client (including ceasing to use them entirely), length and frequency of coaching sessions, and the use (or not) of psychometric assessments. The data reveals that the coaches' approach to longevity clients is always being modified over time and that this modification is due, in part, to the evolution of the relationship between coach and client, or the dyad. These effects are identified by most of the participants as being a natural progression stemming from the growth and development of the client, the growth and development of the coach and the deepening quality and complexity of the dyad relationship.

7.3 Professional coaching organizations and their bearing on the coaching industry

There are approximately 34 professional coaching organizations around the world today (Carr, 2015) and most of them provide their membership with principles related to coaching competencies and ethical behavior. Within many associations, these principles and standards also form the foundation of stipulated competencies to be matched to levels of accreditation of coach mastery created and granted by that association. As of 2015, there were 65 accreditations available from many professional bodies within the coaching industry (Carr, 2015). In turn, those accrediting associations certify coach training organizations which, after educating and examining the coaching students, grant appropriate certifications of mastery.

Organizations serving the coaching industry exist for different purposes (i.e. serving a specific geographic area, or coaching focus, such as the business community), so it is not surprising that each organization authors its own standards. That point being acknowledged, examination of various association standards reveals both similarities and overlap of several aspects of coaching expectations. The next logical step would be for coaching associations to agree on and standardize accreditations or at a minimum, grant reciprocity to one another where possible.

To illustrate these points, I have chosen two associations as examples: The Worldwide Association of Business Coaches (WABC) and the International Coach Federation (ICF). I chose WABC because it concentrates on business coaching (WABC, 2011) which is the subject matter of this project and I chose ICF because currently, it claims to have the largest membership worldwide (ICF, 2020). Each exist to be in service to the coaching community, however with different focuses: WABC's (2011) aim is specifically to serve and enhance coaches and clients working together in the realm of business whilst ICF states that its vision is to advance coaching skills as an integral factor in all areas of life (ICF, 2020). Each association provides lists of expected competencies, standards, and ethical conduct as guidelines for their membership in general and as benchmarks to be applied to their own specific coaching accreditation levels (ICF, 2020, WABC, 2007). Levels of accreditation offered by these two institutions are detailed in Figure 7.1 in order of ascending coaching expertise. Both sets of accreditations are well recognized throughout the coaching community however there is not crossover or reciprocity between them.

Figure 7-1 Accreditation Types

WABC	ICF
Registered Corporate Coach (RCC)	Associate Certified Coach (ACC)
WABC Certified Business Coach (CBC)	Professional Certified Coach (PCC)
WABC Certified Master Business Coach (CMBC)	Master Certified Coach (MCC)
Chartered Business Coach (ChBC)	

These designations are intended to mark increasing levels of expertise and mastery of deepening skills for coaches. In other words, to paraphrase Peterson's observation (2011), to move from levels of good to great.

On that topic, a question for future examination is whether it is 'great coaches' (Peterson, 2011) who generally work within long-term engagements. Is there a correlation between the experience and/or level of mastery of the coach and the likelihood that they conduct long-term engagements? Likelihood aside, it is known already from the interview findings that the number of years' experience working as a business coach (accredited or not) is not necessarily the determining factor for entering into a long-term engagement. As example, two of the interviewees in this study had longevity coachees as among their first clients (see chapter 5). When examining the 'experience' of the coach, the answer cannot be counted in coaching years or professional designations, it must be expanded to include that individual's overall background and training, that is, their phronesis (Gibbs, et al., 2007, p. 366).

Clearly, associations and other professional coaching organizations are an integral part of how this and other research is synthesized and utilized by and for the coaching community. Recommendations related to the coaching question and ancillary data captured are presented in sections 7.4 and 7.7 with these professional bodies in mind.

7.4 Observations from the data

As a result of mining the data and reviewing the literature, what follows is a non-exhaustive list of topics for professional coaching bodies, coach trainers, coaches, and researchers to consider related to longevity coaching. These areas to contemplate through the filter of long-term engagements include:

- The findings from this research have established that working with longevity clients is not unusual for many business coaches (section 7.1). This knowledge presents an opportunity for professional coaching bodies to develop and offer best practices, or really, next practices (Ibarra, 2013) related to working within long-term engagements. Addressing this topic directly may entail developing new or expanded competencies, standards, and ethical guidance (see section 6.4.4), or perhaps 'levels of depth' of the psychology of coaching, expanding on the existing guidance offered in the coaching industry. The coaches in this study refer to their own growth (section 6.4.6) which appears to be conducted mostly by internal guidance. Industry wide support and explicit direction on coach development in the context of long-term engagements may be helpful to this subset of coaches.
- Awareness and discussion of the phenomena of long-term business coaching is overdue as evidenced by the scant literature available on the subject (section 2.7) and the now established existence of this type of coaching (section 7.1). Associations, conferences and other professional coaching bodies and events could open dialogue on the subject through webinars, white papers, break-out sessions, fostering research and other means.
- Future coaching research might be enhanced by standardizing a framework for research data collection for the purposes of comparison and cross-reference to the literature over time, for example, when conducting surveys related to coaching (see sections 2.2, 4.2.1, and 4.3.1). Of course, the reasons for collecting data, including from a survey are endless and it is acknowledged that many of those reasons simply cannot be generalized. Nonetheless, many coaching topics addressed in questionnaires could be presented in a systemized fashion if practitioners and policymakers would work together to agree to do so. Such topics could include how long someone has been a coach (offering uniform answer metrics), span of fees charged (again, standardizing the categories offered), and frequency and length of meetings (see sections 4.2.1, 4.3.1, and 4.4.1). Bringing consistency to coaching

research where possible will, I believe, support the industry, and add even more value to the research conducted and the topics explored.

- Guidance and continuing education would be helpful regarding how to keep the coaching environment intact by maintaining appropriate and professional boundaries, expressly tailored to the situation of extended coaching timeframes (see sections 2.4, 6.4.3, 6.4.4 and 6.4.6). Specifically, practical techniques for recognizing and correcting an erosion of those boundaries if that situation occurs during the life of the coaching relationship. These boundaries might be those of the coach, the client, or both and could entail the topic of friendship (sections 4.5, 5.3.3, and 6.4.3). This training would be applicable to all coaching of course, but may have additional relevance to long-term coaching where a subtle wearing down of boundaries might go unnoticed (sections 4.5, 4.5.1, 5.3.3, 5.3.4, 5.5.4, 6.3 and 6.4).
- The literature has stated the importance of contracting in coaching (sections 4.5.1, 4.6.1 and 5.5.5) though the usage of contracts varies widely (sections 4.6, 4.6.1, 5.3.5, 5.5.5, 6.3, and 6.4.1). The industry overall may benefit from further examination of contracting in its informal as well as formal structures. Perhaps innovative ways can be identified for coaches to contract and/or recontract for engagements that may be well served by continuing into a longer format than originally agreed to. In the interest of ethical and relational transparency (sections 6.4.3 and 6.4.4) the explicitness of a well-designed contract could be helpful. As an example of ambiguous transparency, if the coaching agreement has moved from a structured contract to an informal 'as needed' arrangement, how can both the coach and the client know what aspects of the coach's commitments are still retained?
- A subset of providing guidelines for the contracting process is to educate those who buy coaching services on the possibilities for varying timeframes for coaching engagements and the reasons these variances might be beneficial As the occurrence and value of longer engagements is recognized in the organizational world, it will be incumbent on the coach or coaching organization to educate the buyer about longer time frames. Or, on how to effectively sell longer engagements when appropriate for the good of the client (both the individual being coached and the sponsor).
- Yet another subset of the coaching contract which appears to need examination and recommended best practices is how to recognize the signs that the coaching

relationship is no longer effective (section 5.3.5). Guidance and recommendations for how the coach should act on that recognition with both kindness and firmness for all concerned in a long-term engagement may be unique from other types of coaching. Whilst Cox (2010) has suggested that every engagement begin with the end in mind via the contract the interview findings have demonstrated (5.3.5) that in long-term engagements, the contract is often discarded and the decision of when to terminate then becomes the judgment of the coach.

- Training on how to remain consciously detached while remaining fully engaged over an expanded time is warranted based on the respondent comments about ethics (section 6.4.4). The emphasis here is the 'over an expanded time' aspect, meaning that self-vigilance may require different skillsets from the coach as the relationship lengthens and deepens (sections 6.4.2, 6.4.3, and 6.4.6).
- Provide training and instruction on how to facilitate a client's growth and personal development beyond behavioral or cognitive shifts for those individuals who are predisposed to personal exploration (see section 6.4.5). Such training may encompass adult-learning techniques and/or elements of understanding the human psyche. Wellbelove (2016), among others, has referred to this type of work as 'transformational coaching.'
- Develop courses tailored to exploring coaching processes and packaged frameworks (i.e. GROW, E4, etc.) and provide guidance (new models?) on how to expand, modify, or set such processes aside over time with a client (section 6.4.1). In other words, how to move from linear models (Cavanaugh, 2013) of coaching when appropriate and develop the next level or depth of model when one is being used by a business coach.

These suggestions for researching and addressing the coaching industry certainly can apply to all coaches – from those who are involved in long-term engagements to those who are new to the industry. Addressing these topics as next practices (Ibarra, 2013) for novice and seasoned coaches alike would surely benefit all business coaches. As coaching leaders and organizations offer more direction and training related to the progression of depth and growth of both coaches and clients, coaches will be better prepared for the possibility of extending their practices into long-term engagements when and if that progression is appropriate for the client.

7.5 How the results of this research will be disseminated to the coaching community

One of the objectives for doing this research is to add the results to the growing body of coaching literature and to share those results with the coaching industry. Though I am confident that avenues of distribution will present themselves that I am not aware of yet, I do have a strategy in place for getting the results of this study out to interested parties and for serving my coaching community in various ways. These are my plans to date:

- Write a white paper for the Canadian coaching organization, WABC, about these findings, which is a commitment I had made to the organization two years ago.
- Write an article for a peer-reviewed coaching journal.
- Write an article for the coaching magazine *Choice*. I enjoy the content of this publication and the editor has asked me to provide an article when this research has been completed.
- Send the results of this research to all interested parties (my list is currently comprised of about 240 people) including those who have participated in the study. This undertaking will be accomplished electronically and will either take the form of a copy of this paper, or a synopsis of its findings, dependent on the desire of the recipient.
- Present the findings from this study at one or more coaching conferences. This intention has a dual objective because it includes a desire on my part to expand my horizons into attending coaching conferences I have learned about as a result of conducting this project over the past five years.
- Teach at a university. I believe that I would enjoy training coaches and one possibility would be for me to design one of the courses I recommend in section 7.2.
- Co-author articles, a book section or perhaps a book with another coaching academic. I have been approached by other coaches about this possibility over the course of conducting this study and am very interested in further exploring the topic of long-term engagements with like-minded colleagues.
- Be a research buddy to other Middlesex researchers. The knowledge I have gained about the tangible and intangible aspects of good research is valuable and I intend to use this learning in order to benefit others.

7.6 How this research has and will affect my coaching practice

Perhaps the biggest change for me personally and professionally due to conducting this research is the rise in my level of confidence about myself as a coach. Interfacing with the project participants and the numerous colleagues I have now met and collaborated with from around the world, I now feel like I am working with like-minded souls who are deeply committed to their craft and their clients. Simply, I feel that I have found my tribe (in which I am an elder—probably in all ways!). I now recognize the type of professional that I am, and I am now proud to claim this position of expertise in long-term engagements. My experience, capabilities and trust in my knowledge and instincts has steadily grown throughout the journey of conducting this research, in no small measure due to the knowledge and understanding I have gained about the coaching industry and its praxes. Today more than ever, I consider the holistic context of both the client and their situation and recognize that I already have the skillsets to choose from a wide and ever-growing array of techniques and responses to address them. Clutterbuck and Megginson's (2011) concept of coaching maturity resonates with me and I believe, with both humbleness and pride, that most of the time I approach my work with clients in the way that they describe the work of a systemic eclectic coach – a level of coaching mastery emanating from maturity in their ability to shift and adapt their approach in response to the client, drawing on a wide range of skillsets.

Conducting this research has helped me to refine my coaching practice and has stimulated several specific changes in my own business. These include:

- I have now begun to work with contracts. When I began coaching, I reasoned that the basis for my professional relationships had to begin with trust and I viewed the use of contracts as detracting from that trust. Perhaps that attitude was a remnant of the hippie culture I embraced as a young woman, which eschewed what I saw as the artificial formalities of business. Whatever the genesis, the research conducted for this project, including an examination of coaching literature, has resulted in a new perspective on my part. I now see the use of contracts as a means to put healthy boundaries around 'the coaching container' and to set expectations in a more concrete and business-like way.

- Though most of my clients are entrepreneurs, I do work with some corporate clients. For a variety of reasons, I have generally worked with the executive directly and not with the client's boss or other departments. When agreeing to work with a corporate client, I have now begun to suggest three-way meetings with my clients' bosses as a means of ensuring that the organization, not just the client, is benefiting from the work we do. This change is a combined result of the interviews I conducted wherein the coaches talk quite a bit about the sponsoring organization combined with the literature I have reviewed which addresses the topic of serving the entire organization. These points resonated with me.
- I now always ask clients to create their new goals in writing as opposed to simply verbalizing them to me which had sometimes been my default with long-term clients. I have always asked all new clients to write out their goals, and most clients to create business plans annually, however, over the years with some clients, I did not remain as vigilant. I see my slippage in this area as becoming too comfortable, and now that it has been recognized, it has not continued.
- I designed a one-page statement about a year ago that outlines the mechanics of how I work with a client which I now give to new clients. It is different than a contract, though contains some elements that might also be in the contract, such as expectations for both the client and me. The change here is that I used to provide the same information verbally and more than once this was misinterpreted. Conducting this research has reinforced a preference for mutual clarity and thus, shown me ways to up my own professionalism.
- Most of my coaching career, I worked on an hourly basis only. As a result of reviewing the data collected, I decided (about three years ago) to begin offering coaching packages. These contain a number of sessions to be pre-paid with a discount for the upfront commitment. The primary advantage I have experienced with this development is the outcome of the preliminary conversation which manages expectations of timing for the client. In order to consider whether to commit to a number of sessions, even with clients who have already been with me for years, we need to discuss the 'why' of continuing and I have found the exercise to be helpful for both parties.

- An unexpected result of my research is that watching me navigate this doctoral journey has nudged and inspired many of my clients. I have been told several times that watching the work I was doing has served as a catalyst for some of my clients to stretch to new goals and personal development for themselves. Though this fact does not directly affect my own coaching business, it does add to my toolkit of being a person who models life-long learning for others and of 'walking my talk' as a coach.

7.7 Recommendations for next steps in coaching research

As discussed throughout this paper, the data from this research has surfaced and highlighted topics related to long-term coaching in need of exploration so that they may become clarified within the industry. Presented here are my recommendations based on the data from this study:

- An industry-wide effort to better identify and define long-term coaching versus short-term or typical timeframes in coaching. This should take place both in 'organizational coaching' (Bachkirova & Borrington, 2018, p. 4) and other types of coaching. To date, the length of time in an active coaching engagement has been the main measurement used to identify a long-term engagement. In actuality, the length of time a dyad works together may not be the determining factor, but rather, as suggested by Meierhoefer (2011), the main contributing factor may be the moment where a shift in dynamics occurs that signals a new coaching phase or level of understanding within the interaction. This could include an expansion of services, roles or processes the coach engages with or the way the coach engages with the client either more directly or more personally).
- Addressing the question as to what the activity called coaching is comprised of today and which characteristics and skills identify mastery versus competency for a business coach (Peterson, 2011). Coaches participating in this research project have shared the realities of their coaching practices, which are frequently shown not to be confined to what Blakey and Day (2012) characterize as traditional coaching. This traditional coaching is a supportive stance that attends to the client's agenda through paraphrasing, mirroring, summarizing, and active listening (p. 15). Today, as coaches mature within their craft, there is recognition that the client may not have all

the answers and it is incumbent upon the business coach to first recognize that fact and then act on this recognition in service to the client. As the industry is maturing, it is clear that the parameters in which we understand the meaning of what it is 'to coach' are expanding and in need of clarification. Further explanation is required regarding the expansion of roles, particularly in relation to long-term engagements.

- Guidelines and suggestions to professional coaching organizations for how to support experienced coaches who demonstrate the capability to be able to take their coaching interactions to new levels of client partnership and support. The literature tells us that coaching researchers such as those engaged with this text have begun to consider this question, yet much more work needs to be done. There seems to currently be an assumption within many coaching organizations that all coaches should adhere to the same systems and methodologies (Blakey & Day, 2012) irrespective of the length of the engagement. This study indicates that long-term coaching engagements generate adapted or evolved approaches, and furthermore that both coaches and clients would be well served to have such approaches codified.
- Advanced coursework for veteran coaches is sorely needed, perhaps particularly those who work with longevity clients. Such programs cannot be effectively created without the groundwork of additional coaching research to provide guidance. Bachkirova and Borrington (2018) have stated that it would be 'counterproductive for the educators of coaching to not pay attention to the many levels and variations in coaching assignments' (p. 6). Such levels and variations need to consider not only culture process and business context but also distinctions in the depth of the relationship over time because as the data shows, such distinctions appear to alter the approach of the coach.
- Research to explore the question posed in this dissertation. Charan (2009) has suggested that future leaders will be in need of constant coaching, that coaches will be an essential component of a leader's learning process (p. 28). The data gathered within this project amply demonstrates that many leaders are indeed taking part in constant coaching today. What are the outcomes for these long-term coaching clients and how do their needs differ from those involved in short-term engagements?
- Continued exploration of the effects of long-term coaching engagements on the organization being served by the client. Whether the organization sponsors the

coaching engagement or not, results of an executive being coached spread far beyond the coaching dyad. (Athanasopoulou & Dopson, 2018; Ridler Report and EMCC UK, 2013).

- Discovering how coaches involved in long-term engagements view their work within these relationships compared to traditional coaching (Blakey & Day, 2012). This subject may be an excellent basis for a follow-up study to this research project as the documentation examined here has brought the subject ‘out of the closet.’ It is no longer implicitly or explicitly taboo, nor should it be considered extraordinary that coaches’ practices include longevity clients.
- The ROI (return on investment) for coaching is a topic of continuing ambiguity within the literature (Athanasopoulou & Dopson, 2018) and is continuing to be researched. To use a non-academic analogy, exploring this topic can sometimes be likened to nailing jello to a tree. Nonetheless, exploring ROI outcomes are as valid a consideration for long-term engagements as they are for typical coaching engagements. This observation is based on the breadth of coaches who, by their participation in this study, have documented their widespread adoption of choosing to coach longevity clients.
- An exploration to determine if a ROE (return on expectations) can be identified for clients involved in long-term coaching engagements. Do expectations progress and grow as the relationship continues?
- There may be need to develop a new term for what is currently being labeled ‘long-term coaching’ as this study indicates this type of engagement is not defined as much by length of time as by the context of the engagement, the scope, approach and choices of both the coach and client committed to this interactional format.

Brock (2010) observes that the art of coaching has moved from a set of practices to a social phenomenon. This research validates both the sets of practices already taught and provided throughout the world as well as the need for the recognition and permission of these coaching practices to evolve into ‘next practices’ in the coaching arena (Ibarra, 2013). The evidence presented here shows that long-term coaching affects and influences the coach’s process and approach. By knowing this fact, coaches and coaching organizations who choose to serve clients within the context of long-term coaching can begin to better equip themselves to provide the best service possible.

Chapter 8 Reflections: Personal Learning and Academic Journey

'A coach is someone who tells you what you don't want to hear, who has you see what you don't want to see, so you can be who you have always known you could be.'

(Landry, Tom, 2019)

The quotation for this final chapter is by Tom Landry, who was the head coach of the Dallas Cowboys football team for twenty-nine years. While my coaching career has not been in the field of sports, it has spanned over thirty years and I will say that for the last five years, the journey to completing this project has sometimes felt like the punishing and yet rewarding trek toward winning a Superbowl championship. It has both challenged and expanded all my skills and abilities. Beginning with remotely attending a foreign university located thousands of miles from home, learning how to research and categorize complex subject matters, navigating the world of computer and internet technologies, understanding how to access and assess academic literature and finally, sorting through a vast quantity of data that I was not prepared to work with due to my inexperience as a researcher.

On the personal side, the happenings of everyday life that commanded my time, presence, and input (happy and not) during these past five years tested my resolve to complete this all-encompassing goal – one close family member became engaged, got married, moved away, and had a baby, another went through a divorce and two job changes, an in-law endured an acute illness and passed away, parents were hospitalized for a total of over a dozen times, three stretches in medical rehab for family members due to accidents and surgeries, one parent developed cancer with all the attendant treatments, two parents' homes needed to be sold and emptied, I had one surgery and separately, suffered and recovered from a serious accident that has left me permanently scarred. While my body and soul may have taken some hits, my resolve has remained intact and I am pleased and happy to have been able to complete this project despite the obstacles. Just like a winning team that requires coaching and critical feedback, my doctoral advisors, peers and family members sometimes said things I did not want to hear, challenged me to review what I did not want to review, and helped me realize that I could become what I sometimes did not think I could be - a doctoral student who has been able to create and offer new knowledge to the world by completing my doctorate.

My goal began with a desire to find an answer to a question asked for myself as much as for the coaching world. However, there was an even deeper burning unstated question I wished to find vindication on; ‘Are long-term coaching engagements a valid and acceptable form of coaching?’ During the proposal phase of this research, I came to realize that I had possessed a fear for years that I had hidden even from myself. My fear was that I was one of a few outliers who regularly had long-term coaching engagements and that therefore, perhaps I was not doing 'proper coaching.' This fear was exacerbated by the fact that during the first decade of my coaching career, I worked in isolation from the industry, as there were no coaching associations or conferences at the time that I was aware of, as explained in section 1.7. Having only myself to rely on professionally, I interfaced with my clients using my own business best practices experience, beliefs, and values. When I became aware of the existence of other coaches, I eagerly began connecting with them. It was at coaching conferences and events that I began hearing the ‘something in the air’ (Booth et al., 2016) that long-term coaching was not real coaching, it was more like therapy and I am not, nor did I ever consider myself to be a therapist.

Gray (2009) discusses paradigms related to the field of coaching and there certainly has been an unchallenged paradigm, or perhaps more accurately a reification, within the coaching community that long-term coaching is not good and should be avoided. This paradigm was a conundrum for me because for most of my coaching career over half of my client portfolio has been comprised of clients who have worked with me for many years. Where did I fit in? Based on the success of my continuing long-term client engagements I was confident with providing the right mixture of empathy and challenge needed to be a great coach for my clients, yet my work does not fit the profile of a coach who is compliant with what I have interpreted as the industry’s often unspoken beliefs. Results from the survey have shown me that how I conduct my coaching practice is actually a part of an expanding coaching continuum and I now feel validated as a bonafide coaching practitioner (though I have always felt validated and confident in my abilities as a coach).

Conducting this research was an act of courage because I understood that one way or another the topic of long-term coaching engagements would not be an obscure topic after this paper is published. I also understood at the beginning of this research that there was potential that the data would demonstrate to me that I would need to ethically consider whether to stop doing the work I have loved carrying out for the past thirty years or, to stop referring to myself as a coach. The evidence from the research survey and the interview results allay that fear. I am not alone in how I conduct my role as a business coach and there are hundreds of other coaches (at least) like me around the world. My concerns have also been put to rest by the academic references to long-term coaching engagements which are now beginning to show up in literature. My new point of view is that I and others like me have simply been ahead of the curve in coaching development.

In addition to the data collected, I have learned a lot about conducting valid and usable research. As example, during the analysis phase of this project, I realized that the survey had some flaws in phrasing, which I attribute to my inexperience as a survey designer. For instance, five respondents to question number four answered in one form or another ‘I don’t understand the question.’ Research-assist software is another unexpected area of learning for me. My dual position as a mature coaching practitioner and a new researcher did little to assist me in navigation of the software programs SurveyMonkey and NVivo. Learning each program was a daunting task for me, one which demanded a steep learning curve on my part, and which taxed the depth and breadth of my computer skills. The counter to my uneasiness has been and still is, appreciation for the extensiveness of the data accumulated which I was able to analyze and compare due to the sophisticated features of each of the electronic programs.

During the course of my research and enquiry, I was gratified to be able to identify and academically put a name to a favorite coaching tool I developed over twenty-five years ago and have used ever since - my in-take interview with new clients. It is extraordinarily effective though until now, I did not understand the underpinnings that make it so effective. Exploration of the literature has shown me that my position within the exercise is one of being a ‘Narrative Coach’ (Drake, 2011). That is, I bear witness to my new client’s life by hearing their story with focus, interest and non-judgement. My in-take procedure is as follows:

- After we have agreed to work together, a new client is asked to set aside a minimum of three uninterrupted and totally private hours for our first session. I explain that coaching is a big investment of time and money and that this first session is an essential component for us to maximize both aspects for the benefit of the client.

- I charge a flat fee for that session and explain to the client that if our timing runs over, they will not incur an additional fee (I normally charge for sessions on an hourly basis).
- Though I do not generally work nights or weekends, I always make an exception for that first session. I will accommodate any timing the client asks for to make space for the session without them needing to worry about their obligations in their everyday world.
- Expectations are set by me explaining that this first meeting will not resemble or feel like a business meeting at all and that business concerns will be addressed beginning with the second meeting.
- When we are settled, I simply ask my client to share the story of their life, beginning with the origins of their great-grandparents.
- My job is to be present, to listen, to ask clarifying questions only as needed and to bear witness to the revelation of the twists, turns and subtleties of the story of that person's life. Telling their story employs all the senses of the client and also of me as a coach. It lays the foundation for our relationship and is nearly always a transformative experience for the client.

Clients do continue to tell me their business and personal stories throughout our relationship, however it is in the honoring of their story in that first meeting that a long-term bond is forged. I believe for most of my clients, it is the first time in their lives that someone has actually sat and listened to them uninterrupted and without judgement. This exercise always lays the foundation for gaining trust and being able to offer deeper more meaningful feedback as the relationship evolves.

An unexpected form of validation and joy has been presented to me through the process of data collection – the compliments of my peers. While unimportant to the data itself, receiving gratitude from so many coaches through the survey comments, the interviews, and from coaching colleagues for having explored this subject and doing the research has been quite affirming. This project is an example of my penchant for wanting to make a difference in the world by forging my own path and the affirmations of my peers have left me feeling good about my skills as a coach (asking good questions) and as a budding researcher (getting myself out of the way). This project has provided both the opportunity and the vehicle for me to take the next step in my own professional evolution by contributing to my own practice and my industry in a tangible and important way. Bentz and Shapiro (1998) suggest that good research should contribute to one's development as a mindful person and that this development should be reflected in one's research, including the researcher's purpose for conducting it.

I have striven to grow professionally as a coach by studying my occupation and earning industry designations (ChBC™, Certified Executive Coach, Certified Business Coach). However, these benchmarks of expertise had contributed mostly to my personal skills, not to the fabric of the vocation of business coaching (other than that of my single thread being a good one). I believe this research project does contribute to the emerging industry of business coaching as well as to my personal development. Besides learning about how to research, this process exposed me to a global coaching community in an intimate and candid way, exploring and refining the question by presenting a host of qualifying inquiries – it truly has been an adventure!

This program will culminate in a degree titled Doctorate in Professional Studies (Business Coaching). It is being undertaken both as a crowning chapter to my career as a business coach (though not a final one) and as an avenue to contribute meaningfully to the continuing evolvement of the practice of business coaching and of what it means to coach. As Evered and Selman (1989) said thirty years ago, the meaning of the word *coach* has remained the same, that of conveying a person from where they are to where they want to be. The purpose of this research has been to examine an aspect of how we convey a client – long-term engagements.

Being a pioneer in my industry has generated within me a sense of pride and ownership for the emerging coaching profession and of my part in it. hat pride and ownership, combined with my love for the work I do, led me to Middlesex University years ago when I discovered that I could earn a doctorate in my own unique field, thus adding more academic credibility to the stature of business coaching. Speaking candidly, this work has also fulfilled my lifelong dream to belong to the world of academia at the highest levels of achievement. As a new and proud researcher, I believe that this research provides value during a moment when coaching is still in its formation as a practice. This research contributes a meaningful exploration of long-term coaching, a term that I can now happily utilize, that can then be built on by others as we progress forward.

As a final reflection, I cannot help but smile as I recall that little nine-year old girl whose world opened up after visiting a library, reading a book about an aviator named Amelia Earhart and learning about the possibilities that can be achieved when one believes and is willing to do the work necessary for their dreams to take flight. A little older, and I would like to think wiser for the wear, over the past five years, I have spent hundreds of hours in and out of my local library requesting and reading research material from around the globe for this project – and like that female aviator who inspired me so long ago, I look forward to making the trip across the Atlantic and earning my doctoral wings.

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Appendix A – Survey

Introduction

Greetings!
My name is Phyllis Campagna… and I am a business coach. In my quest to be of service to our profession, and, grow personally, I am undertaking this project as a component of earning my Doctorate through Middlesex University, London, UK (MDX).
I would be honored if you would assist me by taking this business coaching survey. Its purpose is to explore the possible impact on a coach's overall model of practice (e.g. approach, effectiveness, delivery, ability to be inquisitive, innovative, etc.) of working with business coachees for various time frames.
With gratitude,
Phyllis Campagna

Note - Given that our emerging business coaching profession doesn't yet have universal definitions for the terms we utilize (e.g. executive coach, business coach, client, coachee, etc.), here is guiding clarification specifically for this survey:

<u>Long-term business coaching engagement</u>: Two or more years of providing business coaching services to an individual or team.
<u>Business Coach</u>: The process of engaging in regular, structured conversation with a client, with the goal of enhancing the client's awareness and behavior so as to achieve business objectives for both the client and their organization.*
<u>Coachee</u>: An individual or team who is within a business, profit or nonprofit organization, institution or government and who is the recipient of business coaching.*

All individual responses will be anonymous unless otherwise indicated. The aggregate data will be studied, analyzed, and summative data and conclusions may be presented or published in suitable mediums in the future as a contribution to our industry.

This should take about 20-25 minutes to complete. Where numbers or percentages are requested, please provide your best estimate. The questions refer only to your role as a business coach, not other activities you may engage in such as supervision, mentoring, training, or consulting unless specifically asked. There aren't any 'correct answers' to this survey, it is about your practice and how you experience it. Kindly complete and submit this survey by December 31, 2016. Additional suggestions or comments are welcomed and space has been provided at the end for this purpose.

This survey has passed the Ethics Approval Panel at MDX and the project is supervised by Dr. Annette Fillery-Travis. If you have any questions, please feel free to contact Dr. Fillery-Travis at a.fillery-travis@mdx.ac.uk. If at any time you would like your data withdrawn from the survey analysis, we will do so without question. I am happy to share the compiled results with you when the project is completed. Thank you!

****(WABC Professional Standards for Business Coaches, 2013, Worldwide Association of Business Coaches, Retrieved from http://www.wabccoaches.com/includes/popups/professional_standards.html)***

To Begin:

1. Total number of years you have been practicing as a business coach:

2. What is the longest period of time you have provided business coaching to any one coachee?

- Less than 2 years
- 2 - 5 years
- 6 years
- 7 years
- 8 years
- 9 years
- 10+ years
- Other (please specify)

About You and Your Long-Term Coachees

3. Thinking only about your relationship with your long-term coachees (defined as two or more years of you coaching them), past and present, and acknowledging that coaching processes are often unique to the coach with no 'right answer,' please indicate the degree to which you agree or disagree with the following statements:

	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree
I set goals with all my coachees regularly regardless of the amount of time we've worked together..					

	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree
I believe I have the same level of effectiveness with all my coachees, regardless of the length of time we've worked together.	○	○	○	○	○
I maintain the same level of objectivity with my long-term coachees as with my shorter term coachees.	○	○	○	○	○
I sometimes become internally impatient with clients who are slower than I think they should be at responding to coaching.	○	○	○	○	○
I notice than my delivery of my coaching process is different with my long-term coachees than with my shorter term coachees as time goes on.	○	○	○	○	○
I find that I am less innovative with my long-term coachees than with my shorter term coachees.	○	○	○	○	○
I have experienced concerns over whether I get too close personally with my long-term coachees, thus undermining my objectivity.	○	○	○	○	○
I find that when a coachee chooses to make a behavioral change, it is embedded more fully when long-term coaching is utilized.	○	○	○	○	○
I have found that long-term business coaching sometimes leads to a break-down of clear boundaries between me and my coachee.	○	○	○	○	○

	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree
I believe that maintaining a personal friendship with a coachee while providing coaching services to them is not relevant to my coaching effectiveness.	○	○	○	○	○
I alter my processes to accommodate long-term coachee engagements.	○	○	○	○	○
I maintain the same structure and processes for meeting with all my coachees, both short and long term.	○	○	○	○	○

Other Thoughts or Comments

4. Briefly describe the typical steps in your usual coaching process when beginning with a coachee (i.e. freeform, intake, assessments, goal setting, structure via a workbook, etc.)

5. Please consider both your usual process and your answers above regarding your experiences and views of working with long-term coachees and comment on if/how your model of practice and process may or may not have evolved related to your work with them.

About All Your Coachees

The questions in this section are about your portfolio of coachees as a whole, regardless of the amount of time you've worked with them unless otherwise specified.

6. What percentage of your coachees pay for your services with personal funds (versus business budget funds)?

7. What is the gender mix of all your coachees (by percentage) averaged over the past two years?

Female

Male

8. Considering the various individuals and entities you provide coaching services for, please assign a percentage number to each type listed below, total to equal 100. Please do not use the '%' sign when answering.

Sole Proprietor (no staff)

Business Owner (with employees)

Unemployed (currently not actively working)

Executive or Professional of an organization

Management member in an organization

9. What percentage of your coachees (former and present) fit these categories? (total to equal 100, please do not use the '%' sign when answering.)

For Profit

Not-For-Profit (charities, government, academic)

10. On average, how many different coachees do you work with per month (individuals, or, if coaching teams, one- team-equals-one-coachee for this question)?

11. What is the typical frequency of sessions with coachees you've worked with for two years or more?

- ☐ Semi-weekly
- ☐ Weekly
- ☐ Bi-weekly
- ☐ Monthly
- ☐ Other (please specify)

12. What percentage of your current client portfolio have you worked with continuously for: (total numbers to equal 100).

Less than 1 year

Less than 2 years

2 - 5 years

6 - 10 years

More than 10 years

13. Over the past 2 years, how many coachees have "returned" to you for coaching? (Coachees you had completed with who asked to re-engage with you)

About Your Coaching Business

This section explores how your coaching business is set up.

14. Which of these business coaching processes do you offer your coachees?

- Individual coaching (one-on-one)
- Team coaching
- Both Individual and Team coaching

15. How do you structure your business coaching fees? (Choose all that apply)

- Hourly Fee
- Package Fee
- Monthly Fee
- Retainer Fee

Other (please specify)

16. Do you practice as an (choose one)

- ◯ External Coach (You are hired by an organization to provide business coaching-you are not an employee of this organization.)
- ◯ Internal Coach (You are an employee of an organization where your primary role is to provide coaching services within that organization.)
- ◯ Manager as Coach (You are an executive, manager, or employee who utilizes coaching skills and techniques within and as a part of your larger role.)
- ◯ Other (please specify)

17. Currently, do you primarily practice as:

18. Typically, as a ratio, how do you deliver business coaching services? (Numbers added together to equal 100 - please do not use the "%" figure in your answer)

Percentage of meetings in person

Percentage of meetings virtual (telephone/Skype, Facetime, email, text, etc.)

19. Which, if any, of the following coaching-specific qualifications have you earned? (Check all that apply)

- [ ] None
- [ ] EMCC - EIA Foundation
- [ ] EMCC - EIA Practioner
- [ ] EMCC - EIA Senior Practioner
- [ ] EMCC - EIA Master Practioner
- [ ] IAC - Masteries Practioner
- [ ] IAC - CMC
- [ ] IAC - MMC
- [ ] ICF's Associate Certified Coach (ACC)
- [ ] ICF's Professional Certified Coach (PCC)
- [ ] ICF's Master Certified Coach (MCC)
- [ ] WABC's Registered Corporate Coach (RCC)
- [ ] WABC Certified Business Coach (CBC)
- [ ] WABC Certified Master Business Coach (CMBC)
- [ ] WABC's Chartered Business Coach (ChBC)
- [ ] Master of Arts in Professional Development (Business Coaching) (offered by Middlesex University/WABC)
- [ ] Doctor in Professorial Studies (Business Coaching) (offered by Middlesex University/WABC)
- [ ] Other (please specify)

20. Do you offer more than one type of service to your coachees (e.g. ministry, accounting, legal, consulting, therapy, training, supervision,etc.)?

- ○ Yes
- ○ No

Services Offered

21. Services you provide in addition to business coaching (check all that apply):

- [ ] Accounting/bookkeeping
- [ ] Life Coaching
- [ ] Consulting
- [ ] Legal
- [ ] Ministry
- [ ] Therapy
- [ ] Training
- [ ] Supervision
- [ ] Other (please specify)

Demographic Information

Finally, some demographic information for analytic purposes. We're nearly finished!

22. What is your gender?

- ( ) Female
- ( ) Male

23. What is your age?

- ( ) 18 to 24
- ( ) 25 to 34
- ( ) 35 to 44
- ( ) 45 to 54
- ( ) 55 to 64
- ( ) 65 to 74
- ( ) 75 or older

24. In what country were you born?

25. In what country/countries have you worked? (List all that apply over your career as a business coach))

26. What is the highest level of formal education you have completed?

27. If you belong to associations or professional organizations related to coaching, please check all that apply.

- [ ] None related to coaching
- [ ] Association for Coaching (AC)
- [ ] Coaches and Mentors of South Africa (COMENSA)
- [ ] Coaching for Business - Noble Manhattan (UK)
- [ ] Conversation Among Masters (CAM)
- [ ] European Associations for Supervision and Coaching in Europe (EASC)
- [ ] European Mentoring and Coaching Council (EMCC)
- [ ] Institute of Coaching at McLean Hospital (IOC)
- [ ] International Association of Coaching (IAC)
- [ ] International Coaching Federation (ICF)
- [ ] Peer Resources
- [ ] Professional Business Coaches Alliance
- [ ] The Coaching and Mentoring Network (UK)
- [ ] Worldwide Association of Business Coaches (WABC)
- [ ] Other (please specify)

Wrap Up

In addition to this survey, interviews will be conducted with business coaches who have at least five years' coaching experience. If you are willing to be interviewed for this project, please provide your contact information below (each interview will take 45 - 60 minutes and will be conducted by phone or Skype).

28. To receive a copy of the results, or, to be interviewed, please provide the information shown below, or, email me at Phyllis@Excelsis-PS.com. Either way, your name will not be tied to your results as all responses will be processed anonymously. Thank you very much for your time, energy, and contributions!

Name

Email Address

Phone Number

29. Any additional comments and observations regarding your experience with long-term coachees and their impact on your coaching process:

Appendix B – Sample request to organizations to distribute survey

To Whom It May Concern:

Warm greetings. My name is Phyllis Campagna and I am enrolled at Middlesex University, London, as a doctoral student in the Doctorate in Professional Studies (Business Coaching) program. Although I live and work in the Chicago metro area in the United States, I chose Middlesex because of its specific allowance for a doctorate in the profession of business coaching.

As a part of the research for my project, I will be conducting a survey targeted toward coaches working in the realm of business. It will be ready after it has been approved by the MDX ethics panel and reviewing board, hopefully this fall. I am writing to inquire if (name of organization) would consider distributing my request for participation in the survey when the time comes.

It will be my pleasure to share all final results of my project with you for your library of research work, and, also to share the results with all participants who want to receive them. It is my sincere hope that this work with contribute in a meaningful way to the growing foundation of research for our industry. If your policies allow you to grant my request, I will be pleased to work with you on the details.

With gratitude for your consideration,

Appendix C-Themes and ideas emerging from survey data, first iteration

Name	Sources	References
Assessments, Tools, Etc.	10	22
Becoming Friends	8	9
Being Friends is Okay	4	4
Being Friends Not an	2	2
Change of coaching style	1	1
Client Wants to be	2	2
Not Friends, but have a	5	7
Unsure if is Okay	1	1
Bias For or Against	22	36
Against LTC	3	3
Can't judge time needed	5	5
Client wants to continue	2	2
Coachee Perspective	2	4
Dependency	8	11
For Short Term	2	2
Good for Coach	1	2
Neutral and or Open	3	5
No Bias, Situational,	16	22
Pitfalls	1	2
Stigma for LTC	1	1
Coachee Type LTC	14	18
Be leader in service	1	1
Changing challenges	1	1
Client admires	1	1
Client has no	1	1
Client wants to go deeper	1	1
Coach preference-	1	2
Complex positions	1	2
Courageous, open	1	1
Enjoy challenge	1	1
External	1	1
Fewer LTC - belief	2	2
Growth,	3	3
Introspective, self aware	1	1
key marker-exec	1	1
Learning style of the	1	1

Life-long learning and	2	2
Ongoing progression	1	1
Performance	1	1
Person is on-going work	1	1
Various reasons	1	1
Voracious appetite	1	1
Coaching - About in	20	58
Accountability	1	1
Adler	1	1
Change-what coaching	1	1
Client calls as	2	2
Client creates agenda	2	3
Coach conversation	2	2
Coach helps	1	1
Coach willing to	2	3
Coachee energies-	1	1
Confidentiality	1	1
Consultative	2	2
Context-Coach within	2	3
Conversational relationship-coach	2	2
Craft, Art, and Mastery	1	1
CTI	1	1
Cultural Differences	1	1
Duration-typical 6	1	1
Empirical results	1	1
Evidence Based	1	1
Expectations-None	1	1
Fiscal and Social	2	3
Freeform, use intuition	3	4
Goals	2	2
Hybrid of disciplines	1	1
ICF	1	1
Intake questionnaire	1	1
Intervention-it is not	1	1
Know Your Why	1	1
Liaison between	2	2
Listening, Intuition	1	1

Newfield	1	1
Organizational	2	2
Partner	1	1
People, Process,	3	3
Prescriptive	3	3
Provocateur	1	1
Pure coaching-	4	4
Quality of the coaching	1	1
Return on investment	1	1
Rigor, Professionalism	2	3
Session always helpful	1	1
Structured	1	1
Telephone Coaching	1	1
Timing	2	2
Transformational	1	1
Tribal Leadership	1	1
Trigger Thinking-job of	1	1
Truth Telling	1	1
Why Work-Simon Sinek	1	1
Coaching Descriptors	11	21
40,000 foot level	1	1
Be the possibility	1	1
Boundaries	1	1
Celebrate	1	1
Coaching Space	3	3
Coaching Toolbox	2	3
Completion Call	1	1
Conversational	1	1
Dare to get fired	1	1
Desired Outcome	1	1
Didactic	1	1
Emotional Audit	1	1
Enriching	1	1
Evidence based approach	1	1
External Perspective	1	1
Foundation Session	1	1
Free form	1	1
Help person get clarity	1	1
Independent Trusted	1	1
Laser	2	2
Leadership Space	2	2
Level of trust,	1	1
Making Changes	1	1
Neuro-Science	1	2

Ontological	1	1
Opening Question	1	1
Outcomes	1	1
Partnering	1	1
Positive Psychology	1	1
Power Manager	1	1
Remedial Coaching	1	1
ROI	1	1
Seeing Possibility	1	1
Self awareness of	1	1
Spot Coaching	1	1
Success Partner	1	1
Surfacing options	1	1
Team Coaching versus	1	1
Thinking Partner	2	2
Transformation	2	2
Transparency and Clarity	1	1
Coaching Models and	19	57
Change in who pays	1	1
Client Doesn't have	1	1
Client is more open,	1	1
Client readiness dictates	3	3
Coach Changes-	4	5
Coach gets too invested	1	2
Coach is Evolving	1	2
Coaching Morphs	4	4
Efficient, Deeper	1	1
Goals, Focus Shifts	6	10
Measure Effectiveness	1	1
More Direct,	2	3
New Coach,	1	3
Partnership, Co-	4	5
Projection	1	1
Referral vs. Non-Referral	1	1
Remaining a coach	1	1
Sparring Partner	1	1
Structured Process	12	26
Transformation	2	2
Trust, Rapport, Intimacy	5	6
Contracting and Beginnings	15	39
Difference Short Term vs	22	117

About the Coachee	6	11
Change in the Coach	5	6
Comfort, Trust,	10	16
Difference in process	6	7
Faster due to knowing	4	5
Financial Considerations	1	1
Needs are different	3	3
Partnership	3	3
Reasons for LTC	2	2
Value Added over Time	14	16
Engagement Termination	20	35
Ethics	5	7
Boundaries	1	1
Coaching not related	1	1
Comfortable, Lose Edge	1	1
Financial Considerations	3	4
Packages lack integrity	1	1
Having a Coach and or	2	3
Number years as a coach	22	22
Observations,	20	73
Client Individual Pace	4	4
Client wants fast fix	1	1
Coach must care	1	1
Coaching is about	2	2
Compare LTC to	1	1
Complacency of Coach	6	11
Contracting	1	1
Cultural Context	2	2
Difference-External, Internal	1	1
Ending the engagement	1	1
Growth, Learning,	6	9
Higher Quality Result	1	1
Internal Coach Training	1	1
Knowing the Client	1	1
Mutual Learning-	3	3
Non-attachment of	2	2
Not an intervention	1	1

Organizational	3	5
Partnership, Co-	7	9
Privilege to witness	2	2
Purpose=Independenc	1	1
Realization from	1	1
Reasons it occurs	3	4
Remain Present	2	4
Rigor-Maintain	1	1
Supportive of Coachee	1	1
Team Coaching	1	2
Transformational-LTC	1	1
Value-Evaluate	1	2
Watch for same	2	2
Survey-Becoming Friends	1	2
Survey-Bias For or Against	1	1
Survey-Boundaries	1	2
Survey-Coaching models	1	11
6- months typical	1	2
Coaching-how someone	1	1
Freeform	1	1
GROWTH journey	1	1
LTC effective if	1	1
LTC not effective if	1	1
LTC not often	1	1
Mentoring-include	1	2
New approaches, keep	1	1
Partner	1	1
Prefer LTC for depth and not needing to find	1	1
Structure	1	1
Synergistic	1	1
Survey-Coaching-About in	2	2
Survey-Dependency	1	6
Survey-Difference Short	1	5
Survey-Duration	2	2
Survey-Ease with client	1	2
Survey-Ethics	1	1

Survey-Methodology	1	1
Survey-Mutual Learning	1	2
Survey-Mutual Trust	1	1
Survey-Observations,	2	15
Bilateral Learning	1	1
Change in	1	1
Coaching a part of	1	1
Coaching must be	1	1
Dependency concerns	2	2
Likes LTC	1	1
Limit relationship to	1	1
Longer coaching	1	1
LT relationship with	1	1
LTC allows coach to	1	1
LTC can create too familiar,	1	1
LTC clients most	1	1
LTC coachees know	1	1
LTC rewarding for	1	1
LTC suits depth	1	1
LTC=9 months plus	1	1
LTC-Coach has benefit	1	1
Witness Coachee Process	1	1
Survey-Process Evolved	1	135
Accountability for	1	1
Chemistry,	1	2
Client anticipates what	1	4
Client more self-	1	3
Coach adjusts to client	1	1
Coach can be more edgy	1	2
Coach gets more	1	3
Coach-ability to	1	1
Coach-loss of	1	3

Comfortable with	1	6
Customized to needs	1	4
Deeper level over time	1	3
Discovery more	1	3
Easier, better results with	1	2
Ecosystem of client	1	2
Evolution of both	1	1
Evolution of coach	1	5
Facilitated convo with	1	1
Faster, more direct	1	5
Flexibility	1	2
Focus on goals, then	1	4
Freeform	1	4
Frequency of meeting	1	4
Guard against being	1	3
Less about skills,	1	2
Less formal	1	2
LTC more effective	1	1
Mentor using	1	2
No change in process	1	14
No 'chat' session	1	1
Not Understand Question	1	6
Principals stay the same	1	2
Process done,	1	10
Process Itself	1	40
Professional	1	1
Quarterly review	1	1
Relationship changes	1	1
Revise contract less often	1	1
Solution should come	1	1
Sparring Partner-	1	1
Structure &	1	1
Thinking tool for LTC	1	1
Trust Established	1	3
Survey-Process, Approach	1	148
AnD Coaching Process	1	1

Assessments	1	48
CBC Certification	1	1
Company culture-learn	1	1
Consultant-Trainer	1	1
Contracting or	1	23
Custom Process	1	111
E4 System	1	1
EQi	1	1
Five behaviors of	1	1
Freeform	1	23
GROW	1	3
ICF Process	1	1
Intake-Discovery	1	59
iPEC	1	1
KPIs	1	1
Papereoom	1	1
SMART	1	3
Strengths Based	1	1
The Learning Cycle	1	1
VIA Character	1	1
Wheel of Life	1	2
Survey-	1	2
Complete when	1	1
Difficult to say good-bye	1	1
Survey-Value to client-	1	1

Appendix D – Sample: coding an open-ended survey question in Excel

This is an excerpt from my work of sorting and coding using Excel software. Question 5 responses from the survey are shown below, coded into emerging themes. The colors correspond to a resulting graph displayed in Figure 4.9. The findings from this work are presented in section 4.6.

Question 5: Please consider both your usual process and your answers above regarding your experiences and views of working with long-term coachees and comment on if/how your model of practice and process may or may not have evolved related to your work with them.

Legend for answers in first column	
YES	Process did change
NO	Process did not change
CMMT	Comments not directly answering the question
VOID	Unusable

Legend for answers in third column	
CC	Coach/Client Evolution
APP	Approach
FREQ	Frequency

Responses			
YES	1	CC	I do annual reviews with all clients, but after a period of time working together (which varies depending on the client), I hold the client more responsible for initialing the goal setting process. I use coaching skills throughout the engagement to help them assess the big picture and progress towards it as well as more specific tasks and accountability about them.
YES	2	CC	With the long-term coachee, we began with a development review, and feedback from an AC and his boss to frame the coaching goals. So this work began with an in-depth exploration of his psychological makeup and personal history. Now, when we do goal-setting, it's framed by what he thinks are useful issues to work on, usually focused on the new environment he's in, and/or challenges, and/or feedback he's had. I don't challenge him at a profound level, now; we've done that work, and it's become a facilitated "conversation with himself", perhaps. I give him space to do the thinking he wants to. We both enjoy it, I'd say.
YES	3	FREQ	Once a programme is completed coaching process ends. Coachees then come back for coaching on a voluntary adhoc basis as needed due to the fact that a coaching/coachee relationship has been formed and trust has been built
YES	4	FREQ	All longer term coachees are not in structured programmes, but on-demand. It may entail as little as one to three sessions per year.
YES	5	FREQ APP CC	First, this question is difficult to understand - not written well. "Them" - do you mean long-term clients? When I work with long term clients, the foundational work is complete in 3-6 months. After that, the coaching plan is unique per client. What does she/he want? What is required to move them to where they want to go? Time allows the long term client to deeply consider and act.

YES	6	**APP**	We adapt according to the client's needs and learnings over time. We have milestone check-points on progress related to behavioural & attitudinal changes and performance results. We acknowledge both tangible results and intangible/felt experiences of better self-relationships and other relationships (when that's the related objective of the coaching).
YES	7	**APP**	With long term coachees I have been able to develop more indepth processes
YES	8	**FREQ APP**	If I work with coachees for a second or third time, of course I use the base of Information I have gathered in prior projects. Thus structure and process may be significantly shorter, more to the Point (issue). Personal friendship is not what usually results, I would seek more a relationship of seing eye-to-eye and respect. Professional equidistance is what I would call that.
YES	9	**APP**	Once I get to know my client and how he or she responds to my techniques, I will modify them to ensure the client gets the most benefit from our sessions. At our mid-way point, I explicitly ask the client how he or she feels the sessions are going, what I'm doing that is helpful to him or her, what he or she would like me to do more or less of, and anything else I should know to ensure our sessions are productive. While I treat each client as a unique individual, each coaching session results in an action that reflects the session's discussion. We don't have 'chat' sessions.
YES	10	**APP CC**	I don't use a cookie-cutter approach; I often invent new exercises/processes/assignments in the moment on the coaching call. The work I do is transformational, so we both evolve as time goes on.
YES	11	**APP**	I try to brake up the routine with new methods
YES	12	**APP CC**	Both I and coaches evolve over time. I learn and expand as I go and so do they.
YES	13	**APP**	I do find that I'm often able to go to a deeper level, as I know their current level of knowledge and expertise.
YES	14	**APP**	The practice for long term coachees is more effective because we can see the progress and what works and not work then able to adjust coaching style to match with their requirements
YES	15	**APP**	The practice and process stays unchanged for the most part. What evolves is the personal relationship, and that changes the nature and language of the coaching interaction.
YES	16	**APP**	With long-term coachees I find myself still sometimes in fixing mode, but more regularly as a sparring partner that comes and goes in terms of need. Without my long experience from management positions I would have come short of being useful and trustworthy - in this sense I am a mentor who uses a coaching framework to box in our work; a Vygotskian-like framework of defining together what is possible (zone-of-proximal development or ZPD), then discussing the scaffolding needed for the coachee and his/her organisation to succeed and problem-solving coaching as needed. Obviously business savvy and broad experience provide the backdrop: you need a systemic view but also hands off internal processes (which must be resisted). In this coaching I consider directive or behavioral coaching irresponsible as a model (although ok for problem-solving there and then) because you then impose a kind of solution that easily comes from yourself rather than the coachee. Also, of course, my clients would feel like I diagnose them and become a besserwisser. Humility is great :)
YES	17	**FREQ APP**	The long business coachings I've experienced were actually 1 coaching after an other, i.e One first contract for a coaching (10 -12 months), and then the ecosystem and the status of the coachee suddenly changed and brought us to enter a second coaching contract immediately following the first (10-12 months) but with different goals and a somehow different system around the coachee. My experience of such cases brings me to think that the global coaching process is respected, but I lose a part of my innovation ability with time. I keep my ability ton confront, to stay relatively objective, but of course, knowing the scenarii, the automatisms and the success paths of the coachee, I tend to use a certain category of protocol, may be with a possible side effect : a reduction of the number of tools used.

YES	18	**APP**	I have learned to become more creative with my coaching process as engagement length becomes more proactive. It can often result in an innovative expansion of my core model, necessitated in part by the depth that the coaching explores as well as allowing for more nuanced discovery by a client over time.
YES	19	**APP**	What has evolved is my hability to listen when no words are spoken, and in questions that will facilitate the coache to further understand his capabilities and encourage their development. The discovery part is more intense and more in-depth with a long term coaching.
YES	20	**APP**	There is more connecting and wider general conversation than with my short term Clients.
YES	21	**	As my coaching practice, skills and process evolves, I bring a stronger coach to my long-term clients. I may introduce a new concept I've studied. I become stronger, more deliberate and take more risks. They benefit from that.
YES	22	**APP**	Process evolved according to the assessments done and the changes within the organization that impacted their goals and leadership skills
YES	23	**FREQ**	Session with long-term coaches would be less frequent
YES	24	**APP CC**	Long term coachee is easier to work with and better results achieved. Chemistry bonding achieved thru long term engagement
YES	25	**FREQ APP**	Within the long term Coaching relationship - included with the above - I add in quarterly progress meetings(60 min) with Client and line manager of Coachee. Without breaking confidentiality I give and receive feedback so as to potentially adjust my approach also that the Coachee is aware that they are seen as talent and therefore their growth and development is taken seriously by the business
YES	26	**FREQ**	Everything we do is customized to their needs and those often change over time.
YES	27	**FREQ CC**	Shorter term engagements form part of a coaching programme, and have clear objectives. Longer term engagements typically emanate from shorter term engagements, and may be ad hoc when the client wants to work on something specific, or at less frequent intervals.
YES	28	**APP**	Working with clients long-term allows me to "short-cut" observations which allows us to move forward more quickly. Example: I can say to a client "We both know you are resistant to confrontation so how are you going to handle....?" Also, I think the level of trust my clients have in me because of my contributions to them over time allows me to, perhaps, be more "edgy" and they are more open.
YES	29	**CC**	Long term cochees embrace the process and anticipate what they bring to the session.
YES	30	**APP**	Short term tends to be more structured, long term tends to be more of an open format and related to the current situation they are experiencing.
YES	31	**APP**	Long term coaches interaction has become more about psychology of success and their beliefs / mind frame rather than about skill process understanding
YES	32	**APP**	My view on how a client may respond may sometimes coloured because you know them well. I found that mentoring has become more prominent approach after having worked with client for a while
YES	33	**APP**	I have learned to pay very close attention to pinpoint actual behavioral change vs. discussion of behavioral change - I work to validate evidence of change
YES	34	**FREQ APP**	with long-term coaching, have greater opportunity to build in practice and practices to build habits; depending on duration, build in mid-course meeting with coachee and manager
YES	35	**APP**	More diverse ways with the time
YES	36	**APP**	with long term, the planning and goal setting needs to be further extended, in addition dealing with larger emergent challenges became a feature as well as the overall wellbeing of the client
YES	37	**APP**	In my personal experience, having and agreement on a long term relationship will allow you as a coach to invest more time in the preparation of a process infrastructure.
YES	38	**APP CC**	Generally there is an immediate need the client wants addressed. The complexities and interrelatedness are uncovered and together we create a path of development with the agreement that it might change.

YES	39	APP CC	the relation is created and starting off is easier because the coaches knows the process and all introductory part is shorter which helps us to focus on coachee objective and use the full session for the topic
YES	40	APP	I think it loses some traction and a sense of laziness creeps in
YES	41	APP	Accountability for long-term sustainable behaviour change is the biggest benefit of long-term coaching in my opinion.
YES	42	APP CC	Long term clients as a third generation coach to emerge the unconscious and sound board. These individuals are often very self driven and we do not focus on goals as they have no need to partner on this in their lives. they do this by themselves
YES	43	CC	Long term clients use the coaching to work through things which confound them. IOW, they know their normal decision making structure will not bring the insight they need. They depend on the coaching session to be a "thinking tool" which will enable them to get to a level of understanding they normally do not have time for.
YES	44	APP	I have 3 people who have coached for 2 - 4 years. Initially, we had specific behaviors and performance goals. However, as we moved into the 2+ years, the sessions have become more free-form. At the beginning of each session, I ask the coachees what is on their plate and what do they want to discuss. Depending on the issues, we may do some role play or talk through various options to address the issues they present.
YES	45	FREQ APP	short-time coaching process (e.g., 3 sessions) is more focused and targeted longer-term, eg. 12 sessions or more with corporate coachees is more flexible, includes re-shaping and/or adding the goals on the run
YES	46	FREQ APP	Some of my longer term clients have reduced the number of hours that they work with me (from 2 1-hr sessions per month to 1-1 hr session per month). The content of the meetings is more related to how s/he is doing on his/her goals and an update versus discussing issues or challenges the person is experiencing, although it may be the latter as well.
YES	47	APP CC	have a longer-term process and goals with long-term clients; also tend to have more flexibility to making adjustments because of depth of mutual knowledge about working together
YES	48	APP	The standard process of engaging and onboarding a new client will become much more flexible with seniority.
YES	49	APP	Obviously when your coach someone for a long time there is a trust factor In play. just by the evolution of the coaching relationship you get to know each other better so you have to make sure that you keep coaching coaching environment and not get sucked in the new stories that are not relevant to the coaching process.
YES	50	APP CC	The long-term clients have flexibility to do or not do the form that focuses a single session. They typically have a specific goal for the session in mind and state it at the beginning of our session. We coach to that goal.
YES	51	APP CC	Always - we learn every day, from every coachee and interaction.
YES	52	APP	Sometimes more relaxed but otherwise not significantly different
YES	53	APP CC	With my long term clients we have such rich history and context on what they have been and continue to work on. There is quicker recognition of coaching edges, less drama in the conversation because we have built long standing patterns that allow us to get to the issues quickly. The client has also been conditioned over years of coaching and knows where the conversation is going ...accountability, choice, action, etc.
YES	54	APP	WIth a long term client, there will definately be periodically 1) Recontracting - to ensure we still understand how best to work with each other 2) Review and reset of longer term and shorter term goals 3) Can include interim 3 way feedback with sponsor 4) There often can be short cuts in understanding , however I will check in with myself and client to ensure those short cuts are not meaning we miss something.
YES	55	APP	Yes, it has evolved.

YES	56	APP	Always a shortcut straight into how have you been, what has been happening and what would be most useful today. Then a check in with what they had previously been aiming for/committed to Then freeform
YES	57	APP	The only difference is in a long-term relationship the "what I want to get out of the assignment will be iterated and adjusted several times as the emergent coachee goals and challenges change.
YES	58	APP	over time the one page preparation form is abandoned by long term clients (not all of them, just those that choose to do so).
YES	59	APP	There is an ease and flow that occurs with longer term coaches who understand the process and feel at ease with it .
YES	60	APP CC	Flow in process steps is more fluid; goals and change monitoring more coachee-driven; transitions between engagement periods and lulls follow life and work rhythms of coachee; sponsor involvement rare after 2 years.
YES	61	APP CC	My process shifts to them leading the coaching sessions vs. me leading them. I try to make this happen as soon as possible in the coaching relationship. With long-term clients, the shift is more fully realized.
YES	62	APP	I don't review goals or progress as officially as with short-term coachees.
YES	63	APP	With longer term coaching relationships, there are opportunities to explore much deeper and broader, as the coachee develops and our relationship evolves. My coaching process changes, if needed, to suit the changing needs of my coachees, and to better fit where my coachee is in his/her developmental growth. Also, models, tools and process can be more fluid in longer term coaching relationships.
YES	64	APP	long-term clients are less structured over time. we review goals periodically but the flow of the relationship is different and less 'formal'
YES	65	APP	It has evolved by fine-tuning leadership behaviors and mindsets to meet objectives.
YES	66	APP	I find long term coaching is most effective when contracted in "chunks" so there is a beginning/ middle/ end of each segment of coaching.
YES	67	APP	of course the process evolves, as the world does and my client does, i too evolve and therefore unless we all do, then the coaching becomes formulaic and static over time
YES	68	APP	I discover assessments that may promote deeper and or faster awareness the longer I coach a client
YES	69	APP CC	For those who have enough coaching hours or length of time, they do deeper work, eg, vision and purpose
YES	70	APP	When coaching is over a year, goal setting is less rigorous, more fluid. But this may be less related to time and more related to not having a third party involved who needs updates on the coaching , like an HR person.
YES	71	APP	Absolutely! Knowing who "my" clients are is key, and working with people over many years helped me refine my standards and practices. I know my skills and talents better, and I know how to find the clients I can help most.
YES	72	APP CC	My process evolves with the clients process and wants. I work hard to stay close to the definition (spirit) of coaching, differentiating between coaching and consulting for both of us and keep the coaching relationship/client goals as the third entity in our work. That keeps me honest, the relationship fresh and the client moving forward.
	72	Total YES	
NO	1	FREQ APP	re: long-term coachees, I structure each coaching process with its time-limits, goals and assessment of results-to-goals; the next coaching process focuses on different goals with the coachee
NO	2	APP	Every client is different, thus the approach will always be different while maintaining the coaching context towards them.
NO	3	FREQ APP	Annually I have brought them back to their initial goals, assessed progress and reset goals.
NO	4	APP	Since each case is different, I have learned to treat individuals individually rather than rely on a 'workbook' approach.

NO	5	APP	My model of practice is iterative so with long term clients you can go round the model multiple times focusing on different pictures of success
NO	6	**	No evolutions experimented so far.
NO	7	**	I look for goal refreshment more often, am able to call out unhealthy patterns and past successes more easily, and am not surprised when old, incomplete goals resurface
NO	8	FREQ	the principals stay the same, the examples Change sometimes drastically, therefor them Timing changes
NO	9	**	I use the same format each time we start working on a new goal.
NO	10	**	Use my gestalt orientation no matter how long I work with someone.
NO	11	APP	Good question! I suppose with my long term clients we don't revise the contracting part as often as I do with shorter term client. This is because we both become comfortable working with each other and don't feel the need to revise it. I do ask at the end of each session how the session went for the coachee however with long term clients there is less likely revisions requested with my approach.
NO	12	**	No difference - it is always the client's agenda
NO	13	**	no change
NO	14	APP	My process doesn't change as we go along but we can be flexible with where we enter or where we finish each session as long as we get through all steps in every session. Flexibility is less in the early days and more as we get to know each other better
NO	15	**	The evolution of process and tools is more of a factor of my professional development not the length of time I have worked with the client.
NO	16	**	Same process, we will redo the goals if they dont fit anymore if if person achieved them. May do more assessments and new exercises since we go in new directions
NO	17	CC	The same tools are used to provide consistency & practice so they can inhibit the process for themselves
NO	18	**	I really don't believe there is a significant difference. Sure we 'know' each other 'better' and the coach must be professional enough to maintain appropriate separation
NO	19	**	Things change so rapidly and so often in the corporate world due to the evolving environment that I tended to see long-term coaching engagements as more of a succession of short-term coaching engagements with the same coachee. Therefore, they tended to be very similar,
NO	20	**	As I have said there is no difference and all engagements are unique so I don't see any connection of development of process to long term engagements
NO	21	**	The starting point is the same. There are occasions when some of the above is revisited in order to restart or step into a new phase for them. Otherwise, the coaching remains the same
NO	22	APP	With my long term clients I coach pretty much the same as with any client, however, I think I can sometimes be more innovative with them because of the level of trust
NO	23	APP	The process is not any different; what's different is that due to the length of the relationship, goals shift and change over time, and the establishing of client rapport in each session is much quicker. I check in with all my clients on personal updates (vacation or work travel, family events, etc.) regardless of the length of the relationship. What's different with long term clients is that I'm following the client's life and career in a more holistic way over an extended period of time. .
NO	24	**	Process developed early in practice and has not changed, although I refine my coaching (e.g. questions) based on what I learn from both long and short-term engagements.
	24	Total NO	
CMNT	1	**	The biggest evolution I have found is in the technology space and the need to keep up-to-date with the speed of change occurring globally. This has required me to keep attuned to the views and needs of each generation and how they operate in the world of today and tomorrow.

CMNT	2	**APP**	Again, "model" and "process" are not relevant to what I believe and practice are essential for coaching to work. More about relationship, Listening and MY way of being to allow them to be whole and complete the way they are and give them an opening to generate and fulfill theri commitments to accomplishing more than they can accomplish by themselves.
CMNT	3	**	work with 13 brain intelligences 21 sorting styles outcomes spacial intelligence `````feedback measure evaluate
CMNT	4	**	E 4 System
CMNT	5	**	Sharing the vision and the mission of the leader/coachee, assessment of the personality and the role, a loto of role play, strategic behaviors to play to reach challenging goals
CMNT	6	**CC**	I find long-term coachees get coaching fit and start to move themselves through the process with more easy. If what they are saying is on track with what the want from the coaching, I hold the space and leave them as they progress.
CMNT	7	**FREQ**	with long term review objectives at least every six months
CMNT	8	**	I combine business and behaviors to achieve results. Sometimes I coach entire leadership teams both as a team and as individuals. Very effective to move a group of people.
CMNT	9	**	If I've worked with a client for at least 6 months, I provide a dinner out or a gift certificate for something special just for them. Example might include a massage, a fly fishing lesson etc. After a year I might offer an add on service not requiring additional fees such as a 1/2 day team training workshop.
CMNT	10	**	I think short processes are more powerfull
CMNT	11	**CC**	Long term coachees tend to be more familiar with coaching concepts and after a while, have become more self-aware, more self-authoring, and accountable. They also tend to be quite open and constantly curious about their development. The people who get the most out of their coaching, and continue longer, are those who engage in the processes in their own way, and do not feel held down by them.
CMNT	12	**	Yes, tools and perspective have evolved with each client served. This history of accumulated tools and perspective has added value to each new client.
CMNT	13	**	Achieving with consciousness is the ignite for change
CMNT	14	**CC**	My long term clients I still invite at least annually to reflect on where they are, assess their life balance, current goals, intention of the coaching, progress, and where the focus is to be for the next period.
CMNT	15	**	of course my methods and processes have evolved over time and with every new client
CMNT	16	**APP**	When working with long term coachee There is always a contract specifying goals and expected résult and a périod of Time to reach The goals. At The end of The périod There is à new contract on new goals. I never coach 2 times on The same goals.
CMNT	17	**APP**	Still important to monitor progress and align the coachee's goal with the organisation when it's a long term engagement
CMNT	18	**APP**	The milestone meetings with managers are absent as client often changes reporting lines or even companies.
CMNT	19	**FREQ**	the above is a one-time meeting. Ongoing clients may have mini-360's to check for sustainable results, quarterly/annual goal setting, alignment sessions with their managers, etc.
CMNT	20	**CC**	While I have a structure in mind in terms of goal planning, each session is unique and specific to what the client wants to focus on in that session.

CMNT	21	**	Most coaching within the business and organization field is Process oriented with a great deal of Transfer or Change coaching. Use a combination of coaching models plus business skills. (cannot work with executives if you yourself have not experienced executive management positions). The coaching methodology and processes definitely have evolved as I have added further skills and gained more specific coaching experience. As a coach I am far more confident of my abilities and clear as to what I can offer my client.
CMNT	22	**	My process has evolved - the 360 process was not part of the original process but it is now and its very valuable.
CMNT	23	**	Coaching is 98% successful in coaching agreements, regardless of length of coaching relationship.
CMNT	24	FREQ	for my long term clients the frequency of coaching is either twice or one per month
CMNT	25	CC	In this case, client has consistently come to sessions prepared with an agenda of items. We tackle as many as possible without compromising any one item.
CMNT	26	**	As I observe clients and work with them throughout their days I learn a great deal about business models, global crises and issues, models and frameworks I can incorporate with subsequent clients (without violating confidences or intellectual property)
CMNT	27	**	Our processes with coaches in this program continually evolves as we monitor and incorporate industry insights and materials into our coaching program.
CMNT	28	**	I use the progress checks to keep the coaching fresh and focused - this evolves the coaching with that client
CMNT	29	**	My model of practice and process has changed over my 14 yrs. due to my research and what I've learned from working with the clients.
CMNT	30	CC	Primary difference between short an long term coachees is that long term coachees can take on bigger changes, such as shifting and implementing a new framework for their leadership.
	30	Total CMNT	

VOID	1		No comment.
VOID	2		.
VOID	3		Sorry, I do not understand this question.
VOID	4		I do not understand the questions.
VOID	5		Not sure what you mean here....
VOID	6		I am not sure what you are asking
VOID	7		Not clear about the question.
	7	Total VOID	

Appendix E – Sample of email requesting an interview

Sample of Email Distributed to Participants Requesting a One-on-one Interview

Dear _____,

My name is Phyllis Campagna and some time ago, you kindly took my business coaching research survey related to the possible effects of long-term coaching (defined as two years or more with a coachee) on the coaches' practice.

The second phase of my research is to conduct interviews with business coaches. I randomly chose names from among those who indicated they might be open to being interviewed and your name was one of them (325 took the survey). If you are still willing to be interviewed, and if you've coached any coachees two+ years, I would be honored to speak with you (since the answers on the survey are anonymous, I don't know if you are among those who've coached any coachees long-term).

I am recording and transcribing each interview, as required by Middlesex University. The platform I'm using is FreeConferenceCall.com.

It appears that you are located in _____ and I can provide you with a toll-free phone number for the conversation. The interview itself will take 30 – 45 minutes. I live in the Central Standard Time zone, seven hours behind your time zone.

I will happily move my schedule around to accommodate your timing if you are still willing to be interviewed, and I don't mind evenings or weekends.

Thank you for your time and consideration.

Warm Regards,

Phyllis

Appendix F – Interview guide

Guide Sheet Used to Conduct Interviews

Ask for permission to record the interview. Turn on the recorder.

State our names and the date and the country.

With recorder on, ask permission to record the conversation and read:

The purpose of today's discussion is to explore the effect (if any) of long-term business coaching on the coaches' practice by tapping into your experiences. It is anticipated that this interview will take 30 – 45 minutes. If, for any reason, you do not wish to answer a question, or, continue with a subject, please say so and we will move on. If you want to end the interview, I will turn off the recording immediately, or, if you decide, for any reason, that you do not want your answers used as part of the collection of data, none of your answers or comments will be used. If you agree for this interview to be included in the data, your answers will be collated in the aggregate, but will remain anonymous. It is possible that excerpts may be quoted in the final paper, without identifying the person. I will provide you with a written transcript of our conversation today. Do you have any questions or concerns before we begin?

- How many years have you practiced as a business coach?
- When contracting, either verbally or in writing, do you tend to engage for a standard number of sessions or for a specific time frame, or is it left open?
    - Do you have a maximum number of coachees you choose to work with at a time?
- Can I get a feel for your practice? What is your general model and approach both in structure and philosophy?
    - prescriptive vs. pure coaching vs. consulting, customization
    - Do you begin with an intake or discovery session?
- Are there circumstances when your model changes from coachee to coachee?
- Focusing on your long-term coaching experiences, what is the longest period of time you have coached any one coachee? (or, any one group)
    - In your experience, are there circumstances where a long-term engagement is called for? Differentiate.
    - How, if at all, does your coaching model change over a long-term engagement? (i.e. deeper, faster, more/less challenging, more/less candid, etc.)
    - Would you say your interactions with a long-term coachee are different than those of a short-term coaching engagement?
- Would you say that there's a 'type' of coachee, or a situation, which allows/causes the engagement to continue and become long-term?
- Do you have a criterion you follow for when a coaching engagement should come to conclusion?
    - (coachee's performance or level of engagement; declining value of the sessions)
- How do you, as a coach, evaluate the value you bring?
    - competencies as a checklist? Put on paper the value of the coaching based on observations and coachee report of progress
    - Do you believe you add more value over time, or less?
- Do you have a bias for/against long-term coaching?
- Do you have thoughts to share about long-term coaching that I haven't asked about?

Appendix G – Topics from interview transcripts coded in NVivo.

There are 510 coding references from 22 interviews.

These references were coded into 15 topics. Reviewing, combining and recategorizing yielded the final 8 themes presented in section 5.3.

Name	Files	References
Becoming Friends	8	9
Bias For or Against	22	35
Coaching - About in General	20	54
Coaching Descriptors	11	21
Coaching Models and Changes	19	53
Contracting and Beginnings	15	38
Difference Short Term vs Long Term	20	46
Ethics	5	7
Having a Coach and or Supervision	1	1
Number years as a coach	22	22
Observations, Reflections, Beliefs on LTC	20	73
Phrases, Labels	17	77
Terminate Engagement	19	34
Tools, Assessments, Etc.	10	22
Type of Coachee LTC	14	18

Appendix H – Transcript from one interview coded within NVivo

C14 Interview

April 11, 2017

Hi there, this is Phyllis Campagna and I'm here with ____ who lives and works in New Zealand. That's correct?

C14: That's correct, yes.

PLC: Thank you. And ___, for the record, I'm asking for permission to record our conversation.

C14: That's fine, that's fine.

PLC: Thank you. And, I would like to read you this statement:

The purpose of today's discussion is to explore the effect, if any, of long-term business coaching on the coaches' practice.

It is anticipated that this interview will take 30 to 60 minutes. If at any time, for any reason, you do not wish to answer a question or continue with a subject, please say so and we will move on. If at any time you want to end the interview, I will turn off the recording immediately. If you decide for any reason that you do not want your answers used as part of the collection of data, none of your answers or comments will be used. If you agree for this interview to be included in the data, your answers will be collated in the aggregate but will remain anonymous. It is possible that excerpts might be quoted in the final paper without identifying the person. I will provide you with a written transcript of our conversation today unless you ask me not to. Do you have any questions or concerns before we begin?

C14: No, that sounds fine.

PLC: Thank you. So, how many years have you practiced as a business coach?

C14: Well I've been a professional coach since 2001. And, I am what is called a business coach as well as a leadership and executive coach.

If could just say something about the tag of business coach…

PLC: Please do.

C14: So, while I've got, you know, in my webpage I talk about business coaching and being a business coach.

And I know that there are many business coaches out there that are not coaching. They're doing something else. So, they're working with business owners but they are doing a lot more like consulting and advising than coaching. And that is something I have to make very clear to business owners that are coming to me for what they call me, business coaching is that if they're wanting me to tell them what to do and give them templates and all these things, then it's not coaching.

So, it's me about the tag of business coaching let's people know basically where I'm working. But once there's a discussion, I make it very clear-I'm not coaching your business, I'm coaching the business owner or the people in the business.

So, it's people coaching in the small business context if that makes sense.

PLC: I love that definition. People coaching. It does make sense.

So, I'm going to ask you; when you are people coaching, what is the general frequency of sessions between you and your coachee. For example, do you meet weekly or semi-weekly, or monthly?

C14: I usually…(both talking) Sorry, sorry….

PLC: No, no, go ahead,

C14: It usually starts off as fortnightly sessions.

PLC: Okay. And, do you go from meeting to meeting, or do you offer a package or a standard number of sessions?

C14: I've recently switched to packages. And the initial package is usually 6 months coaching with fortnightly sessions. And after the 6 months, or before the 6 months are up, we usually have a conversation about where they're thinking they're at with the coaching, are we finishing up next month, or, what do they want. Because many, many of my small business clients end up carrying on for sometimes, on and off, up to 10 years. So, it's very much after that first 6 months when they've got their momentum with the coaching process and they understand how it all works.

Then some of them might move to every month, some of them might carry on, some might completely stop, but then come back 6 months later, or a year. It's really, each person is just unique and so I tailor after the initial 6 months.

PLC: So, the initial 6 months, generally would be about 12 sessions?

C14: Hmmm, yeah, depending…yeah 12 sessions, yeah.

PLC: Okay. So, for this question, counting a group if you coach any groups as a single coachee, how many coachees do you generally work with at a time? Do you have a maximum that you're willing to coach at any point in time?

C14: Do you mean group coaching or do you mean individual coaching?

PLC: If it's it a group, we'll consider that group to be one individual.

C14: So far, I don't quite get the question.

PLC: Oh, I'm sorry. How many coachees can you, or do you choose to, coach at a time. And if you're coaching a group, we'll count that group as one coachee.

C14: Ummm, at one point I had a maximum of 12 clients at a time we're working weekly. However, I do other work and so from doing other…training or something, that might come down a bit. But I've learned 12 is my absolute maximum on a weekly basis.

In effect Phyllis, to be honest, I've probably brought that down a bit. To maybe 10 or 9. I just like to give myself a few more breaks.

PLC: I understand and I think every coach has their own rhythm for this sort of thing.

So, ___, can I get a feel for your practice? And what I mean by that; do you have a general model, is there a series of steps that you take with every coachee? And also, what are the mechanics of those steps and what is your philosophy which I think you shared a little bit in the beginning when you said people coaching. Sot that was a mouthful of questions there, please break it down in any way that's comfortable for you.

C14: Hmmm. In terms of, let's see, you used the term…models, my coaching, my coaching itself draws on a number of disciplines. I refer a lot to neuro-science and the coaching space and then the leadership space. And have done for several years now as soon as it started emerging. Positive psychology is another discipline I draw from. Solutions focused thinking, you these are just some of the disciplines. An NLP master, very occasionally I might use an approach that is from that space. And so there's lots of different disciplines I might draw from.

In terms of having a methodology, I have learned that everyone is so different. I really have to be prepared to start with a blank canvas with the client and ensure that the steps and the coaching plan work for them.

Having said that Phyllis, there's a really, really simple approach that I use that works for probably 85% of goals, if you like. And it's really simple. Simple, breezy.

Both: Chuckle.

C14: It's…so, where are you now, where do you want to be, what's in the gap? Make a plan, implement the plan, review and monitor. And, you know, the review and monitor, that can be on-going for years if they keep achieving their goals and re-setting new ones,

So you know the 'where are you now'…so, we might have a goal, two or three goals since we're ready (?). in the ___ of space. I usually encourage a business signer to have a personal goal as well. So that he or she is keeping an eye on balance.

So the first step around the goal is just getting clear about where they think they're at with this goal. So, in a business perspective it might be well, you know, what's your revenue, what's your profit, where do the clients come from, what are the successes, what are…you know, that sort of stuff.

And then moving to the vision. So what does this goal look like when it's achieved, what does the business have to look like for you to achieve it? Or, the vision might come first, you know, it just depends on the client which way they want to do. Which (garbled 3 o4 4 words).

And then of course, the next step is for them to say what's in the gap for the business. For themselves.

PLC: What's in the gap? G-A-P?

C14: Yeah.

PLC: Thank you.

C14: What's in the gap between where they are now with their business and where they want their business to be. You know, one of the approaches I use is I've got a kind of business wheel that's got all the different parts of a small business. From systems to marketing to management to, you know, all the different parts of a small business.

So I ask them to consider if they are going to achieve this goal, what's your business? What does each part of that business need to look like?

So it gives them a sense of how close they are to what it needs to be and what's in the gap for them to develop a plan around. So by the time they start making changes, they've done some pretty deep thinking about what the goal is. What's the vision? Where they're starting from. And what needs to change.

And then there's the plan about how they're going to change. So by the time they start making changes, which is what coaching's all about usually, they've really thought through it. They've thought through different impacts and implications, how they're going to manage that so that it ___ creates certainty for them in the teams, and staff involved. And, they've got a plan. So they're not just jumping in and changing everything. All at once.

PLC: I understand totally. And, with that plan, in the beginning, do you do an intake with your new clients, your new coachees?

C14: When you say 'intake,' what do you mean by that?

PLC: In your initial meeting, do you have a format that you follow, or a certain series of information and validation that you're looking for before working with that coachee?

C14: Yes, I do have, before I take a client on, what I call a chemistry check. And in that meeting which might be an hour, it's really a discovery meeting for me to find out what it is they think they wanted to change, what they're looking for from a coach, how they worked with a coach before, do they understand, what do they understand about coaching. And a little bit about what they've decided, some detail about what they're looking to achieve in their business.

But the purpose of that first chemistry check meeting is for me to understand how much they understand about coaching. And it gives me the opportunity to explain this is not consulting or me telling them what to do. This is them figuring it out with my help. And, also, I make sure they've got an understanding of the kinds of approaches and disciplines and ___ and processes we might call on. And, how the coaching works.

You know, so I talk about the importance and the benefit of the accountability structure, especially when you're talking business owners, you don't have a boss. That can be where the real gold is. But it needs to be understood. There's a really positive structure, not as some kind of punishment structure.

Both: Laughter.

C14: So, it's really that part of conversation, it's really just making sure that there are clear expectations, responsibilities spelt out for the client as well as me. So they've got absolute transparency and clarity about what it is they're getting into.

And also, you know I call it the chemistry check because as you would know Phyllis, there are some people you just don't click with. Or you just know you're not the right coach for. And I've learned that the hard way starting out, taking on people that are thinking 'I'm not sure if this is right for me'

Both: Laughter

C14: Or if I'm right for them. So I have learned to listen to those intuitive messages that we all get. And explore it, make sure it's just not something on me on that day. And if I feel that I'm not the right coach for them, or they're looking for something that I can't offer, or there's just not a good, sort of, rapport, I'll refer them to someone else.

PLC: I completely understand and have done the same thing on more than a few occasions.

I would like to focus on some of your long-term engagements with your coachees. And my first question is; what is the longest period of time you've coached any one coachee?

C14: Hmmm. Continuously, or with breaks, or what…

PLC: It can be with breaks. Because we do have returners, don't we? So many of us do.

C14: I think the longest then, and I'm currently working with them again at the moment, is one person I started to work with at the beginning of 2005.

PLC: Ohhh, about 12 years.

C14: Yeah, yeah.

PLC: And, are there particular circumstances where a long-term engagement is called for, or where you experience it's more likely to happen?

C14: Could you ask me that again?

PLC: Sure. Thinking about a long-term coaching engagement as an aggregate of 2 years or more, are there certain circumstances or situations that would tend to foster long-term coaching versus, say, a six-month engagement.

C14: Hmmm. I don't know.

PLC: That's a fair answer.

C14: Yeah. I'm thinking. I might have to come back to that.

This one that I've been working with since 2005…we worked for a year or two years and then might have had a year off and then come back and I've always done other work with this person, with his board or work with his teams. You know, done workshops for them, not currently. But what's been interesting about this particular person, when I first started working with him, he was actually a sour person. And he had another business as well of design. And then next time he was the sales manager.

Both: Chuckle.

PLC: Okay

C14: And then the next time he was general manager of a different business. And now he is CEO of a multi-million-dollar business. And so, we've sort of, um, he's kept on growing. And so every time he's come to a new challenge, he's realized the coaching, so I suppose I must be doing something right.

He needs the structure, you know accountability structure, somebody to restriction and ask him the hard questions that he's got no one else to ask of him. And provide the support. It works, it worked really well for him which is why he is coming back.

As a coach, it's been such a privilege that he keeps coming back and he's grown again and he's having such great success and quite different things there than years ago, which I can't remember.

PLC: Isn't that gratifying?

C14: Chuckle…it is, it is…I said the other day 'you know when you asked me that question what if it was?' and I said no. He said 'well you did. And it was fantastic.'

Both More laughter.

C14: Oh dear.

So I guess the kind of….

PLC: It could be the kind of coachee.

C14: I think it's to do with the coachee. And just thinking it's a kind of industry. It's not. You know, he's in a manufacturing business, manufacturing, retailing.

Another woman I've worked with for about six or seven years is in PR marketing, which is quite different. Another person that I've worked on and off with is in a financial planning business.

So, the industry doesn't seem to be relevant, but when I think about these particular people, they all have a determination and an energy for growth and being stretched.

PLC: That makes sense to me.

C14: Yeah. I mean, I have worked with some business owners where we've done our six months and they've got what they wanted and they've…it's clear, that's who they want. They don't want any more.

PLC: Right.

How, if at all, does your coaching model, or your coaching approach, change over a long-term engagement? So, for example, deeper, faster, more challenging, less challenging, more candid, less candid…

C14: Yeah, all of those.

Both: Chuckle.

PLC: Okay!

C14: I've found it's…it becomes an even more intimate partnership. Again, thinking about this one person I've been with all those years, I've seen him go through 3 marriages and go from knowing that he shouldn't drink whisky because he gets a bit tense through to now, practicing meditation, doesn't drink alcohol, got a swami and we've kind of been on that journey together. And so this is where any coaching I view as such a privilege. I have a very deep understanding of how that person thinks and values and ____ of people.

And that's where that ___ is, it makes the conversation easier. And at the same time, it can make it more challenging because as a coach I'm constantly checking in my preparation for a session that I don't have any particular leans on. Because I know how he responds and works and has done before, I need to, in the coaching session, keep checking that that is actually what's happening and that's not just my brain saying, 'this is the way it is.' Do you know?

PLC: I do. You're checking for transparent filters. As I believe, this is a personal comment, every good coach does. So, I'm with you.

C14: And it's, I suppose, that's where the challenge is. When you've got, you know, a number of clients that you've been working with for a number of years…and as you're probably gathering, my approach is quite holistic. I learn a lot about people which makes the conversation really and that there's privilege space.

And, as a coach, always making sure that that's what I'm being. You know, a coach, and not a mate.

PLC: Oh, what a good distinction.

C14: Yeah. I mean having said that, I get birthday cards from them and, you know, little presents and I'll do the same. Like you would a friend. But they're not friends, they're clients. You know, when I'm coaching them.

PLC: Have you ever had a coachee become a friend later, or, during coaching?

C14: After the fact. I've got quite a few people who I've coached that I would probably call friends now. I mean, not friends that I see a lot, but, or close friends, but, you know, the relationship is more friendship than coach-coachee now.

That would not be the case if I started working with them again. I find it quite easy to set boundaries and expectations. And at the same time, when I'm in a long-term coaching engagement, it's just a preparation, a ____ sort of ticking my thinking.

PLC: I get it.

So, you had commented that certain types of coachees are what create the long-term engagements. Is there anything you want to comment about those coachees and how they're different than short-term engagement coachees?

C14: They're usually more courageous, more open to coaching and being stretched and challenged.

Yeah…. I just thought of something and it came and went.

Both: Laughter.

C14: Maybe it will come back.

PLC: Okay.

Do you have a criteria that you follow…?

C14: Oh, I know what it was!

PLC: Go ahead.

C14: Chuckle. Sorry. One thing about my business is its pretty much all referrals. And, where it hasn't been…when I have an introduction that is not from somebody who has actually worked with me, often they don't quite fall into that same level of courage and growth. But it seems, you know when I'm working with someone and they refer me to somebody else, it's the like to like.

And I think that's an important part of my business mix anyway…is I know if I do any kind of marketing and get people in that are new to me and got no referral or interaction, I know from experience that it's a different coaching feel. That just setting the expectations and being coachable.

PLC: Being coachable. I do understand. Chuckle.

Was there anything else on that part?

C14: No, no.

PLC: Okay. Do you have a criterion you follow for when a coaching engagement should come to a conclusion? And that might be the coachee's performance or level of engagement or declining value. Is there anything you're looking for?

C14: Other than when the vision and goals are achieved, and they feel like they're done. It's stretching up. If I get a sense the sessions are not as much value as they used to be, or there's a change, I will check that. Matter of fact, a client I'm going to talk to today, what's on my list to talk to that is what value she's getting from the sessions? Because I'm noticing her, the way she's going about doing some of the commitments, it seems to be not as important. So, I am checking for that kind of thing.

The last thing I want is people turning out for their sessions and not getting as much value as they could. I'd rather cancel the whole contract than have people just turn up and not be in it fully.

PLC: I resonate with that completely. I feel the same way.

As a coach, do you have a particular methodology to evaluate the value that you bring, whether that's a checklist, or a check in with the coach's supervisor, or the corporation…

C14: Well, if I'm working with a large corporate, I use ______ with the coachee and the line manager or the sponsor. A meeting so that everything's very transparent and I get, you know, one of the measures of success that they're looking for and then within the session, I work with the coachee around those. And that would be a measure of success.

When I'm working with a business owner, that is usually part of one of the first meetings, it's about what are the measures of success that they want to use in this process. How will they know that they've been successful at the end of this?

It might be just around the goals achieved, it might be around something else that comes out of it, but at the start of the process, I have 2 or 3 prepared questionnaires that ask them, you know, what they want out of the coaching, what motivates them, will they know about themselves, you know, really opening the ______. And then, the last session, when we have a last session, is a completion session about what has been achieved, what hasn't been achieved, and how they would rate the success. I don't rate it, they rate it.

I also have various checklists in different spaces, it might be business checklists, it might be personal ones, and so that's another measure, you know, this is what it was at the start, this is what it is now, what do you think of that. So, it's that kind of approach. Again, I'll use one or all of those kinds of things, depending on the…on what the person needs to complete powerfully.

PLC: Sure.

C14: You know, I've worked with leaders or on a corporate situation, is different to my (garble).

PLC: And that would make sense I think.

C14: Mmmm….

PLC: Strictly from your own point of view as an experienced coach, do you believe that you add more value over time, or less, or the same value to your coachees? And by 'over time,' I mean short-term engagement versus long-term engagement.

C14: I would say about the same.

PLC: Okay. About the same.

Overall, do you have a bias either for or against long-term coaching engagements?

C14: Ummm…no, no. I mean, when I think of my longer-term clients, I didn't know they were going to carry on for years.

Both: Laughter.

C14: So, no, no, I'm just very much in the moment on that.

PLC: Okay. And finally, do you have thoughts to share about long-term coaching that I haven't asked about?

C14: Hmmm. Probably only that I've probably alluded to already is…it has great benefits in terms of the kinds of depth of relationship and knowledge of each other that you can know that's really useful and powerful.

And the flip side of that is, you know, just ensuring that as a coach you're not becoming automated or complacent or lazy. Just because this person has been around such a long time. It sounds like a funny thing and I would be surprised if any coaches were in that space but I just think that part of the deeper relationship, an on-going long-term relationship is constantly being present. If the client is like most of mine that keep coming up with the mixed ___ themselves, I think its important to always keep ensuring you don't fall into just session to session, what's coming up in this session kind of coaching. I think there…most people in my experience do much better with the bigger picture in front of them all the time while they're doing this.

Because occasionally, I have fallen into the trap of following what my coachee wants and what's coming up in this session or the same personal whatever. And if it goes on too long, in my experience, you can lose your way a bit. What are we doing here?

Both: Laughter.

PLC: Thank you, I'm going to hit the recorder off button, and I'll be with you in just a moment.